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*Conditions of learning for older learners in some previously disadvantaged schools in the  
Cape region: a qualitative exploration.*

*A research report presented to*

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## **ABSTRACT**

This study explores the positioning of learners who are more than three years older than age-norms for their school grades in societal, institutional and situational levels of education discourse in South Africa.

A review of research literature, of samples of lay discourse and of policy documents reveals tensions between industrially derived assumptions and rights-based assumptions in education discourse at societal and institutional levels. These opposing assumptions are seen to simultaneously disadvantage older learners while appearing to hold out the promise of unconditional inclusion in schooling.

A qualitative empirical study traces some of the effects of the tension in education discourse on learners at a situational level of education discourse, namely schooling.

The conclusions of the study suggest that the resolution of the tension in accordance with rights-based assumptions would result in radical reconceptualising of schooling arrangements and learner assessment. Suggestions are proposed for a research agenda that the reconceptualising of schooling might generate.

**Keywords:** 'Over-age' learner; globalisation; standardisation; rights; policy; identity; agency; inclusion; criterion-referenced assessment.

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## 1. INTRODUCTION

### *1.1 Aims of the project*

The aim of this project was to investigate conditions of learning for 'over-age' learners in some disadvantaged schools in the Cape region.

'Conditions of learning' in this context refers to the framing assumptions under which these learners experience their education.

This aim led me to explore their positioning in discourses of schooling at societal, institutional and situational levels of participation.

### *1.2 Context and rationale*

I became interested in the phenomenon of "over-age children" while supervising students' practice teaching in ex- DET schools in the Cape metropolitan area. Between two and six teenagers were present in most senior primary (grades four to seven) classrooms that I visited. Firstly, my experience of teaching adolescents and secondly, the theoretical underpinnings of language didactics as taught at Cape Town College of Education, where I work, led me to suspect that these learners were likely to be experiencing learning difficulties in conventional classrooms.

In the House of Assembly sector that I had come from, a lag of more than three years in a learner's school career was attributed with a fair degree of confidence to trauma, physical injury or problems in an individual's cognitive development. The presence of these learners in mainstream House of Assembly classes had been relatively rare because they had tended to be removed for targeted assistance in special schools or encouraged to exit the system if they reached sixteen years old in Grade 8. The general assumption operating in the House of Assembly environment was that learners who were considerably older than their peers were manifesting some innate form of intellectual inadequacy that made them ineligible for inclusion in normal classes. Furthermore, a belief that the older learners might have a disruptive influence on social relations in their classes led to their presence being viewed as undesirable.

The second source of my perception of the phenomenon as problematic came from aspects of the teacher education curriculum that I was helping to deliver at Cape Town College of Education. Biologically linked developmental theories underpinned much of the didactics taught in the college. Teachers graduating from the institution were encouraged to create

'age-appropriate' learning environments. I realised that practices derived from this advice would be alienating for learners who do not fit the profile of predicted age-norms. Therefore, it seemed to me that simply providing access to a classroom was not enough to fulfill older learners' requirements for access to education. Conditions in the classroom had to take cognisance of their developmental needs.

I approached two organisations that I knew had professional experience of the phenomenon in Cape Town and embarked on a literature search that I hoped might yield some insight into the relationship between these learners and their learning environments. I came up with very little that paid particular attention to teenagers located in primary schools in either local or international literature available to me. The basic assumption in the available literature was that learners were physically located or grouped with their age cohorts, even in multi-grade classes or in cases where they were experiencing learning difficulties.

Although literature on the phenomenon was scarce there was recognition of the urgency of the problem in greater Cape Town in the work of the Primary Open Learning Pathway trust (POLP) and of the African Scholars Fund (AFS). POLP had developed a curriculum for over-age learners (ages 8 - 14) in the Junior Primary aimed at accelerating their learning so that they were more likely to be able to join their age cohort in higher grades. AFS assisted disadvantaged African children to complete schooling to Grade 12. Because of financial constraints this fund tried to identify those with potential to complete Std 10 (Grade 12) and constantly wrestled with decisions about whether to fund scholars who fell more than three years outside the age-norm of classes. AFS workers were not optimistic about these learners' ability to complete Grade 12 successfully. Both these organisations were convinced that the problem merited serious attention because of its large scale.

Over-age learners seem to suffer double jeopardy in the education system. Firstly, their predicament has been generated to a great extent by socio-economic and political forces beyond their control. Secondly, reform of the schooling system has been directed towards increasing the efficiency of distribution of resources but the criteria for measuring the progress of reform do not work in favour of learners who do not conform to age-norms. The criteria appear to be drawn from assumptions underpinning the organisation of standardised mass education. Among these assumptions appears to be a belief that standardisation, including strict adherence to age-norms, will effect equity and therefore meet the demands of just access to education. Because it is in the nature of standardisation to look for broadly applicable solutions to problems, it is not likely to produce policy that would prioritize the

specific demands generated by diversity in the school population. I suspected therefore, that age-anomalous learners would be insecure in the system.

My intention at the outset of this project was to explore the disjuncture between the developmental needs of older learners (adolescents) and the primary school learning environment in which they found themselves. I saw it as problematic that adolescents were being expected to learn effectively in environments constructed for much younger children, yet their predicament appeared to be neglected in the literature. However, in the process of reviewing the literature I realised that the problem lay elsewhere.

Consequently, as the project developed I became aware that the positioning of 'overage' learners in the language of education discourse in the first place was problematic and probably accounted for a lack of attention to their dilemma and the marginalisation of their claims to unconditional and favourable access to educational resources. For example, the common referent behind the terms *overage*, *dropout* and *repeater* is the concept of a time-bound linear progression of the curriculum best illustrated by the metaphor of a production line in a factory. In the context of this metaphor, these terms are pejorative and might lead managers of education to view older learners as undesirable in the schooling system.

In South Africa, the Bill of Rights underpinning the 1996 constitution has become a key criterion for evaluating the legitimacy of policy. In terms of the spirit of the Bill of Rights no category of learner should be excluded from access to education by systemic constraints. A bill of rights inserts the learner's right to have a voice in shaping an inclusive system into education discourse.

The focus of the literature and data analysis then became directed at exploration of the pressures inherent in education discourse on social relations that influence the implementation of policy. The decision to focus on social relations between levels of the discursive hierarchy in education influenced the stance of my analysis in a way that can be described as follows:

*The world is considered to be a repressive labyrinth of "social production," a construction of pseudoselves who are pushed and pulled by cultural dynamics and subtly diffused "regimes of power." (Spretnak 1991 in Denzin & Lincoln 1998:77)*

This point of view carries an assumption that hierarchical levels of discourse would ultimately influence the way older learners were able to engage with the system in their classroom situation. Realisation of their rights would depend on whether conditions of learning

generated by social relations between levels of discourse in education made such realisation possible.

The terms 'societal', 'institutional' and 'situational' in this document refer to levels of education discourse in society. 'Societal' refers to the most widely dispersed, generally lay, level of discourse. At this level political pressures on education policy generation are highly significant. 'Institutional' is used to refer to the field of education and how it is managed in society, and 'situational' refers to the material environment that learners find themselves in, for example, school. The system of education comprises all these levels of discourse.

The focus of my attention and concern was the presence of a significant number of flesh and blood teenagers with aspirations apparently stuck in a system that overlooked their legitimate claims for effective access to education. The scale of the phenomenon indicated failure of the system to reconcile the reality of the presence of age-anomalous learners who had rights to effective access to education and the logistics of school management.

My common sense (uninterrogated assumptions) told me that these learners were denied effective access to the new post 1994 rights-based culture of education because they did not conform to the time scales informing the design of the primary curriculum, which consequently did not accommodate their developmental needs. Their presence signalled a disjuncture between a dispensation that foregrounded systemic efficiency and one that compelled recognition of rights to access as a priority. The disjuncture can be seen as a symptom of epistemological crisis in the education system.

It became clear that the way these learners were treated by policymakers would be a marker that would gauge the progress of transition from a disintegrating episteme informed by industrially derived assumptions and values to an episteme in the throes of negotiation, a process that would generate new practical arrangements in terms of its evolving rationale.

Ideally effective learning conditions are characterised by school arrangements that enable learners to believe in themselves as agents of knowledge advancing their realisation of the good reflected in the values of their social context. Such belief would contribute to an emotional state of well-being, or security, in the system. Under these conditions, relevance would be recognised affectively by learners in the coherence between their *habitus*<sup>1</sup>, aspirations for the good and epistemic conditions that provide security of purchase in the

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<sup>1</sup> Milieu: life-world, including socially shaped personal constructs used to evaluate experience (Bourdieu cited by Bernstein UCT seminar 1997).



educational system. A sense of security depends on the unconditional acceptance of the learner's own biographically constructed - rather than systemically defined - identity by authority figures in the learning situation.

The archetype shaping the episteme of the previous dispensation can be seen as resembling an industrial organisation that used a production line version of time to design and assess educational processes, and ascribed identities to learners that confirmed them in roles constructed to maintain the organisation. Learners in the previous apartheid dispensation were not encouraged to develop autonomous agency, so that real difference between old and new dispensations would be revealed in the degree to which learners are constructed as being capable of, and having a right to exercise, agentic learner behaviour.

The supposed epistemological crisis in education demands attention on two practical levels: the curriculum has to reflect and support the social transformation taking place in post-apartheid South Africa, and materially equity has to be effected to achieve the goal of redistributive justice necessary to realising common citizenship based on equal human rights spelled out in the 1996 Constitution. These imperatives are addressed in these key policy documents:

- National Qualifications Framework
- Curriculum 2005
- Schools Act 1996.

How older learners in the school system are positioned in these documents is likely to delineate the tensions and fissures, as well as the efforts to preserve continuity, in the transition from the old tradition and its episteme to the new dispensation. The ways older learners are positioned in the documents are examined to discover sources of epistemic tension.

Hence the focus of this inquiry is on conditions of learning experienced by learners rendered anomalous by discursive practices that generate assumptions that have produced disadvantageous environments for older learners.

Questions were framed inductively after tracing the effects of policy on older learners' epistemic engagement along a macro-micro continuum that encompassed

- society as represented in the body politic,

- the institution<sup>2</sup> of education,
- learners and educators in their school situations.

The resulting questions were:

1. How does South African education policy frame and influence older learners' learning conditions?
2. How do older learners respond to the construction of their identities in the learning environment?

The outcome of the exploration of these initial research questions would be to arrive at recommendations that might address a further question relating to logistics:

3. How can deployment of resources be adjusted in school management to provide older learners with optimum access to effective education?

### *1.3 Structure of the project*

The stance I adopted towards the phenomenon was exploratory. I did not start from a position of either seeking to prove or disprove a hypothesis. The process has therefore been inductive and interpretive, did not progress in strictly linear fashion, and the way the structure of the project unfolds reflects this orientation:

- Chapter 1: Introduction. This chapter describes the project's aim and rationale and provides an overview of the dissertation.
- Chapter 2: Literature and policy review. This chapter reviews the literature that contributes to an understanding of the phenomenon of 'over-age' at societal and institutional levels. It includes reference to empirical studies, policy and common sense notions.
- Chapter 3: Methodology. This chapter describes the methodology used to investigate the situational level of discourse in an empirical study.
- Chapter 4: Presentation and analysis of data. This chapter presents and discusses the results of the empirical study.
- Chapter 5: Conclusions and recommendations. This chapter discusses the results of the empirical study in relation to the literature and policy review and makes some tentative recommendations with regard to further research.

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<sup>2</sup> See pg 4 for explanation of the use of the term 'Institution'.

## 2. LITERATURE AND POLICY REVIEW

### 2.1 Introduction

Section 2.2 of this chapter summarises the results of my literature review on 'overage' learners. The discussion includes their positioning in research into mainstream schooling in developing contexts, including South Africa; relevant local and international studies; the influence of globalisation and research sponsorship on the metaphors of education discourse; the tension between efficiency and effectiveness in research; epistemology and language; and effects on learners' rights and subjectivities.

Section 2.3 discusses pressures on policy and the distribution of power in education discourse.

Section 2.4 analyses clauses of policy relevant to 'overage' learners and traces tensions in policy between the language of rights and the language of standardisation.

### 2.2 Research literature

Because the phenomenon of 'overage' learners is so ubiquitous in South African schooling, my assumption when I undertook this project was that I would find a considerable body of research on cognitive and psychosocial dimensions of adolescents' experience in primary schools. This assumption proved to be mistaken. Specific references to this category of learner were rare, and when they did occur, they tended to be in the context of discussions about socioeconomic conditions rather than about learning conditions.

Consequently, a major problem that emerged at the outset of this project (1997) was the invisibility of older (adolescent) learners in available research literature, particularly with regard to primary education. Therefore I had to look for information on this category of learner in other contingent sites of discourse.

Interviews with African Scholars' Fund (ASF) and Primary Open Learning Pathway (POLP) personnel provided valuable guidance on how to explore the context of the phenomenon of older learners in the available literature by alerting me to possible themes and sites for a literature search. In an interview with Jill Wenman of POLP (March 1997) I learned that problems associated with the overage child syndrome in the Western Cape include family migrancy, economic stress, malnutrition, displacement, female domestic responsibilities and

absenteeism. At school level problems include relationships between children and teachers, lack of resources, inflexible management styles and staff hierarchies, inadequate communication with parents / care-givers, large classes, poor administration and chaotic assessment practices. Some of Wenman's observations about out-of-school factors that influenced the 'overage' syndrome were corroborated by Jacklin, Hoadley and Guzula (1999):

*Disruption of schooling due to movement between regions (especially migration from the Eastern Cape to the Western Cape) was linked to overage. 33% of all drop out incidents were related to migration. Other factors that contributed to the disruption of learning included bad health, poverty and familial disruptions (such as deaths, divorce). (in Taylor and Vinjevold 1999: 285)*

Margaret Ellsworth of ASF pointed out problems at policy levels to me. She explained that during the 1970s and again in 1994 schools were instructed not to admit children more than two years outside the class norm but that these instructions were ignored or deliberately flouted in a spirit of resistance to strictures imposed by an illegitimate regime. Consequently, records were unreliable as school administrators concealed the presence of over-age children from departmental officials. At the same time, schools became sites of political struggle. General chaos and political violence obscured the learning difficulties of teenage illiterates in school; a situation that would have militated against systematic research into the epistemologies or cognitive development of these learners in school settings.

Literature on the psychosocial effects of social disruption caused by political violence during the eighties and nineties is available. The perception of the effects of the widespread collapse of adequate provision for adolescents at all levels of schooling during this period led to the emergence of the ubiquitous and defeatist term 'lost generation' (Donald, Lazarus and Lolwana 1997). The oxy-moron *over-age child*, used to denote a learner who has failed to connect with the education system at the designated moment, is still used frequently in the informal discourse of educators in South Africa but like *lost generation* is seldom found in the literature because of its connotations of failure and exclusion (Dawes 1994; Donald 1997). The absence of the terms in official discourse, however, has not removed the perception by bureaucrats and grassroots educators that the presence of adolescents in primary classrooms is problematic.

The perception that adolescent learners in primary school are aberrant is probably because the referent behind the commonly understood construction of *learner* in schooling is time bound, predicated on mass schooling in developed economies, and expressed in a style of

management that is intolerant of aberrance generated by failure to engage with the system at the specified age. This intolerance finds expression in labels, not always accurate, attached to learners who have fallen foul of the age-norms: *dropouts*, *repeaters*. The learners, not the system, attract the pejorative labels and are seen as deficient. Focusing on learners' 'deficiencies' enables the failure of the system to provide effective learning conditions for age-anomalous learners to remain veiled. Research is therefore likely to become oriented towards honing the system to preclude age-anomalous learners from the discourse of mainstream schooling rather than towards reforming the system to accommodate them.

From my literature search I developed a perception that the language of standardisation had a marginalising effect on discourse about learners who do not conform to the age norms of mass schooling. This language is expressed in metaphors derived from industrialism and is promoted by research paradigms emanating from hegemonic industrialised nations.

The discussion that follows may suggest why these learners are possibly being reincorporated into mainstream schooling discourse via positioning as part of previously excluded categories based on disability rather than as 'normal' learners.

#### 2.2.1 Relevant research studies: local and international

A number of quantitative studies on dropout and repeater rates and estimations of out-of-school children have been undertaken in South Africa (Taylor 1989; DET 1992; Education White Paper 1995; Edusource 1994 in Wenman & Pease 1996, Motala 1995). The most common methods of obtaining statistics for these studies were from collation of official data from education departments. Before 1994 the Central Statistical Service did not include the statistics of the TBVC (Transkei, Bophutatswana, Venda, Ciskei) 'independent' areas (Taylor 1989) and these figures were obtained from the Institute of Race Relations and RIEP (in Taylor, 1989) surveys.

According to statistics provided by the DET (1992), in 1990 20% of learners dropped out of school after the first year, 32,7% of children between the ages of 8 and 14 were three years older than the norm and 19% four or more years older. Although "survival" rates improve after the first year of schooling, the problem of children not conforming to the age norms of their class continues. The finding that it takes on average 18 years for a learner to progress to Grade 12 and that a smaller proportion of school leavers go on to tertiary education than in comparable developing countries (Crouch and Magoboane 1997 in Taylor and Vinjevoel 1999) indicates that the situation has not improved significantly since 1990. In transnational

studies such as those undertaken by the World Bank (Samoff 1993), employment rates of graduates from tertiary programmes are seen to be principal indicators of efficiency in education.

Since the local studies referred to above were undertaken, 17 departments of education were merged into one during 1996 - 97, but because the ex-DET (Department of Education and Training), TBVC and self-governing homelands schools comprise the largest constituency of schools, the problem of 'over-age' remains proportionately unacceptably vast in the post 1994 integrated education system. Motala (1995) notes that only 51-66% of African enrolments were likely to reach Std 6 (Grade 8) within 12 years, compared with 96% of 'white' pupils in 8 years.

In spite of having enjoyed more socio-economic stability and better resourcing of education than other provinces during the past two decades, the Western Cape nevertheless has had to confront the issue of older learners. Learner Age X Grade distribution statistics supplied to me by the Western Cape Education Department (WCED) for 1998 revealed that there were 15405 (approximately 5% of the total) learners in intermediate and grade 7 classes who were more than three years older than official age norms. The highest number in this range was 4201 in grade 5. Most of these learners came from economically disadvantaged areas and were Xhosa speakers. A high proportion of these learners could be expected to leave the school system barely equipped for economic activity, a situation contributing to what Samoff (1993) defined as *wastage*.

I wanted to find out whether the key problems identified in the interviews with Margaret Ellsworth and Jill Wenman mentioned above had produced versions of the 'over-age' syndrome in other parts of the world. This led me to look at literature on studies in South Africa and in developing countries to see whether pressures on the category of learner dealt with in this project impinge on learners in other developing countries that attract the attention of international policy-makers.

My literature search revealed that the phenomenon of 'over-age' learners in school is found in many under-developed economies. Socio-historical pressures that militate against children's normal progression through school have been the subjects of numerous mostly qualitative studies both internationally and locally, where there appears to have been consensus about 'the black child in crisis', a particularly prevalent and specific feature of the struggle against apartheid. (Everatt and Sisulu 1992).

Poverty is seen as a root cause of failure to progress through schooling all over the world, even in developed countries where its influence on achievement levels of children from minority communities in the USA and UK is examined and debated. Internationally available literature throws up a number of issues raised by Jill Wenman and common to disadvantaged communities in developed and in developing, 'poor', countries and South Africa, namely:

- Migrancy (Dawes and Donald 1994; Wilson and Ramphele 1989; Burman and Reynolds et al 1986; Motala 1995; Booth 1996).
- Economic stress (Wilson and Ramphele 1989; Soobrayan 1995)
- Urbanization (Bettis 1996; Motala 1995; Wilson and Ramphele 1989)
- Domestic division of labour (Graham-Brown 1991)
- Violence: South Africa has much in common with South America in particular. Although political violence has abated since 1994, violence due to high crime rates is a cause of stress but has not been subjected to the same degree of scrutiny as that attributed to political pressures (Donald & Dawes 1994) to date.
- Malnutrition. (Richter and Griesel 1994; Donald & Dawes 1994)

All the issues listed above receive attention in the literature available to me, but none of them deal specifically with their impact on the older (teenage) child's engagement with learning in primary school.

There is a wide body of literature internationally which recognises that multi-age and multi-grade schools are a common reality even in developed countries (Little 1995; Gausted 1995). However, most of these studies assume that there is a normal correspondence between age and grade in multi-grade classrooms. Furthermore, a range of two to three years is considered to qualify as 'multi-age' in American terms, whereas such a range would not be seen as 'multi-age' in the South African context where a range of three years per grade is treated as 'normal'. Multi-age in this literature therefore, does not accommodate the notion of 'over-age' in local terms.

#### 2.2.2 Education research – globalisation, efficiency and effectiveness

A factor perhaps not foreseen by People's Education activists who drove demands for a new liberatory, context-specific curriculum during the 1980s was the impact of South Africa's emergence from international economic isolation. The desire to be internationally competitive introduced a new dynamic into local discursive conditions: global market forces and indices of performance.

Apartheid education and its disadvantaging consequences are well documented but over and above the disadvantages 'over-age' learners have suffered as the consequence of apartheid socio-economic conditions, learners in South Africa have been further disadvantaged by global pressures emanating from industrially derived assumptions. These standardising assumptions expressed in metaphors of the production line exert pressures on policy formulation that in turn marginalise age-anomalous learners simply because they do not conform to an arbitrarily decided age-grade norm.

In his article *Internationalisation and globalisation: rethinking a curriculum of communication*, Kress (1996) discusses the impact of these trends on particular localities. Globalisation he sees as

*the increasing tendency for the globe to constitute the effective domain of action and of thinking, in relation to a specific issue (p.186).*

Kress names financial markets, communication (and therefore many aspects of culture) and production as examples of specific issues. Because all these issues impinge on it, education could itself also be seen as a specific issue subject to the pressures of globalisation.

Globalisation, or as Kress prefers - internationalisation - of production is closely linked to the participation of global development agencies in restructuring local education to make the labour force responsive to the shift of production from expensive - in terms of labour costs - developed economies to less costly developing countries. These shifts are generally seen as beneficial by both the agencies (representing the views of 'developed' national economies) and the recipients of funding ('developing' economies). Kress points out however, that the effect of globalisation is to fragment the integrity of curricula in former nation-states by disrupting the inter-connectedness of their structures of control derived from social and cultural institutions. In other words, in South African terms, the specificity of local problems and needs that may be accommodated in local curricula tends to be overwhelmed by a drive to shape education systems to fit the norms of hegemonic developed countries that provide finance and research expertise.

In addition, current economic trends in the USA, which enjoys hegemonic status globally, encourage policy makers to see certain categories of learners, mostly very poor, as expendable (Figueira-McDonough 1995). The scale, complexity and specificity of poverty-



related problems in South Africa have the potential to generate an unacceptably high rate of 'expendability.'

In South Africa-based research there is a tension between the imperative to produce internationally comparative quantitative data to motivate funding for development projects that will draw South Africa into the global economy, and qualitative data that will meet the needs of social reconstruction in a post-industrial age characterised by industry's inability to provide adequate employment opportunities (Bettis 1996). This tension is reflected in Jansen's review (1995) of effective schools research during the past three decades.

Effective schools research [ESR] is a major category of research influencing policy and funding worldwide. A tension between effectiveness as efficiency of resource allocation and output measured against standardised criteria and effectiveness as degrees of mastery in specific learning situations has gradually emerged in research over the past three decades. This tension has epistemological significance. A belief that uniform provision of resources should enable learners to reach a predictable level of growth at a designated time indicates a view of **knowledge** as external to the learner, and of **knowing** as being a result of the learner being acted upon by appropriate inputs, rather than acting. A belief that **mastery** in learning situations is the prime goal of education shifts attention onto learners' ability to actively construct knowledge from contextual cues in the learning environment. **Knowing** becomes a description of the ability to make connections between cues that answer a need identified by the learner in a particular context, in other words, to exercise agency.

Jansen (1995) has applied a useful critical framework to the assessment of effective schools research, examined its transnational impact and limitations in the developing world, and proposed an alternative paradigm to the check-list model, resting on different methodological, epistemological and resource assumptions underlying the research until now. Jansen's review groups ESR according to research emphases he discerns in each decade since the 1960s when it gathered momentum.

The 1960s he characterises as a period of large sample, quantitative studies initially measuring resources and average achievement. This gave way to interest in progress in provision rather than achievement, and to a more complex notion of resources according to which students and teachers were described as primary and physical facilities, class sizes and curricular and instructional strategies were seen as secondary resources.

Context-specific research at the University of Cape Town on progression through schooling (Jacklin, Hoadley and Guzula in Taylor and Vinjevoold 1999: 284-286), at the University of the Free State into teaching and learning materials for multi-grade classes (Strauss in Taylor and Vinjevoold 1999: 329-331) and by the HSRC on practices in multi-age classrooms (Drost, Magau, Mdekazi and Ural in Taylor and Vinjevoold 1999: 276-277) has recently been undertaken under the umbrella of the President's Education Initiative Research Project (Taylor and Vinjevoold 1999). The focus of these projects was on finding out why learners failed to progress through schooling, how teachers were coping in multi-grade classrooms and on availability of resources, ultimately with a view to improving systemic efficiency (Taylor and Vinjevoold 1999: 235) rather than on epistemological issues.

Attention was, however, paid to epistemologies of learning and teaching obliquely by the researchers:

- The social benefits of some of the coping strategies, such as peer tutoring and delegation of responsibility, were noted (Drost, Magau & Mdekazi in Taylor and Vinjevoold 1999: 277) - both practices that would resonate with the emerging rights-based episteme because of the enhanced degree of agency these strategies allow learners. In their reference to how these particular practices might help to cultivate *responsible citizenship* as a positive goal the researchers also indicate their own sensitivity to the emerging episteme in the implied construction of 'responsible' as taking charge of learning and learning conditions, that is, exercising agency at school in preparation for adult citizenship.
- A 'too strict' teaching style that did not allow learners to argue and dependence on rote learning were criticised (Strauss in Taylor and Vinjevoold 1999: 329-330), again indicating an expectation that learners should exercise more autonomous agency under the new dispensation.
- Although the focus of the inquiry into learner progress and achievement was not directly on epistemology, an inference can be drawn that epistemological assumptions grounded in a belief in standardisation can be discerned at work in selection for admission to some secondary schools in Khayelitsha where a hierarchy based on standardised matriculation results has emerged. In other words a belief that successful learning was an outcome of an efficiently engineered system, rather than of mobilizing an individual learner's agency, was at work in school management. Schools had to perform well in comparison to each other in terms of standardised norms. An obvious way to achieve 'quality' according to this belief would be to pay attention to the quality of the school's intake, just as a factory owner insists on acquiring quality raw materials to produce an excellent product. Significantly, researchers note the effect of comparisons of schools' results in press reports on public perceptions of

school effectiveness, and consequently on school policy, playing out in competitive intake selection procedures (Jacklin, Hoadley and Guzula in Taylor and Vinjevold 1999: 284).

It should be noted that none of these studies examines the specific issue of the relationship between learning conditions in schooling and non-conformity with age norms. Noting that this omission is a weakness in the sub-study titled *The extent and causes of overage in grade eight* (Jackson, Hoadley and Guzula in Taylor and Vinjevold 1999: 285) the researchers have recorded their intention to remedy the omission in subsequent studies.

Jansen (1995) clusters ESR into useful categories for policy-making and makes a significant distinction between effectiveness and efficiency and their relationship.

Jansen proposes that research into effective schools has been limited by existing theoretical and methodological procedures rooted in the positivist tendency to seek universalising principles. Attention to quality of outcomes would fall into the 'effectiveness' paradigm and conformity with universalising principles would measure 'efficiency'. One can infer that because the problem of 'over-age' children represents a deviation from the norms generated by universally applicable principles of mono-age classrooms, its epistemological dimensions, which would have a direct influence on teaching and learning strategies, have tended to be overlooked or excluded in research supporting policy aimed at improving systemic efficiency.

Significantly, a commitment to favouring effectiveness before efficiency is expressed in the national Department of Education guide *Curriculum 2005 Implementing OBE - 3 School Management*:

***Emphasis is on effective schools, not simply efficiency***

*In the past, many schools and classrooms were run efficiently. In other words, they were neat and quiet. But, strangely, many still produced poor matric results or had high drop-out rates. In other words, the schools weren't educationally effective.*

*They were not producing desired learning outcomes or outputs.*

*In recent years, an emphasis has been placed on the effectiveness of schools as learning organisations. This involves a commitment to continuous development and improvement and a constant striving for small but significant improvements in a process involving everyone in the school. A school's success will be measured by it meeting pre-defined and measurable performance indicators that must be related to its key function, namely educating young people. (Gultig [ed] 1997: 14).*

However, the framers of the curriculum guide, drawn from the ranks of professional educators, are not also the officials who are accountable to politically appointed heads for

resource distribution.<sup>3</sup> Resource management gives effect to realisation of curricular goals, so that resource distributors actually exert more pressure in the discourse than do professional educators. Different imperatives drive these two sets of role-players, the professionals and the bureaucrats.

Kress (1996: 188) observes that all countries have to deal with the effects of globalisation in the contexts of their histories. In South Africa responses to the education crisis have often come from non-governmental sources in a spirit of resistance to officialdom. Foreign donors wanting to help to effect transformation have funded these organisations. A great deal of assessment of effective teaching practice is still carried on in response to demands for accountability from major funding agencies such as USAID (United States international aid organisation), WUS (World University Services), World Bank, JET (Joint Education Trust - for the European Community), who increasingly require reporting to conform to transnational assessment criteria. There is likely to be a tension between the need to reassure global development agencies according to internationally recognisable criteria of effectiveness and efficiency, and local imperatives to deal with myriad context-specific situations arising out of the social complexities of South Africa's transition to democracy. There is a difference between the homogenising tendencies of global development agencies, and the focused approaches of local non-governmental organisations [NGOs] that concern themselves with particular issues of effective classroom practice (Jansen 1995). However, global agencies are becoming more sensitive to context-specific quality issues and their policies should not be seen as static or as driven solely by a consciously internationalising agenda. (Soobrayan 1995). Rather, interest in context-specificity is a response to the perceived fragility of systems that is revealed in transnational quantitative studies.

Samoff (1993) gave early warning about some of the concerns later raised by Jansen (1995) when he identified *wastage* as one of the most serious problems in education in Africa. Wastage can be construed as a manifestation of systemic fragility.

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<sup>3</sup> In a seminar at the University of Cape Town (July 1997) Basil Bernstein described the battle between professional educators and politically accountable agencies to control the construction of pedagogic identities during periods of change. He sees this battle as fundamental to the shaping of policy and its implementation.

*Wastage*, significantly another metaphor derived from industry, refers to spending limited resources on projects that are never completed and investment in inefficient training programmes whose graduates fail to finish and are poorly trained. Samoff (1993) makes an important point with regard to the abnormal (by the standards of developed countries) 'normal' high attrition rate in African education systems. The assumption underpinning the notion of 'wastage' is that students fail to meet the criteria of a curriculum conceived according to universalised norms for 'good' education. In other words, mastery is not achieved at any useful level. A 'good' education is seen to contribute 'usefully' to a country's development by enabling graduates to participate predictably in the global economy. Children are expected to move through schooling towards employment in age-referenced cohorts, and the efficiency of a curriculum tends to be evaluated in terms of standardised expectations of 'through-put' linked to an anticipated age of exit from the school system.

Skills seen as necessary for global participation are universally measured by transnational quantitative studies such as the IEA reading literacy survey (Elley 1992). The appropriateness of these tools to African contexts is rarely questioned. Instead, the research and reporting that goes into the processes of policy formulation tends to be focused on reducing wastage by looking at reduction of unit costs and improvement of through-put rates rather than on improving the effectiveness of each unit. Samoff's (1993) argument implies that research driven by funders from developed contexts is informed by experience of largely homogenized systems resting on at least a century of mass provision modelled on the notion of education as a production line. He proposes an alternative, namely, that efficiency be measured in terms of learning rather than expenditure. The consequence of this change in focus is to discover the incompatibility between measuring efficiency in terms of cost, and measuring efficiency in terms of learning outcomes particular to context-specific programmes. The inference is that criteria generated by the industrialism of the developed world and its consequent processes are counter-productive in the African context because they consign an unacceptably large group of learners to the category: *wastage*. Furthermore, this label is not compatible with a rights-based episteme that should guarantee an individual learner's access to education and purchase in the system's assessment arrangements, regardless of system constraints.

Literature on 'open school' systems in Colombia (Psacharopoulos, Rojas and Velez 1993) and Africa (Lockheed and Verspoor 1991) implies that some experience of the over-age syndrome has been encountered in these countries, although strategies developed to address it have not always been unqualified successes. Lockheed and Verspoor's (1991) studies for the World Bank questioned the effectiveness, both in terms of cost and educational outcomes, of non-formal approaches to primary education - the 'no - schools' concept. However, the

concept of a dispensation in which students can proceed at their own pace, enter and exit in response to economic and other constraints and exercise choice within a curriculum suggests that an effort is being made to engage constructively within a rights-based paradigm with learners who do not conform to age norms.

There appears to be a growing sensitivity among researchers worldwide, alluded to by Jansen (1995) in his conclusion, to the fallacy of universal application of quantifiable inputs, predictors and measurements of success. If this sensitivity were to become a dominant trend, 'over-age' children seen as aberrant might be able to return to a reconceptualised mainstream. The universalisation of the benefits of primary education to facilitate global participation in economic growth may in fact rest on reformulating present universally applicable measures of effectiveness. Researchers may need to look increasingly to context-specific phenomenological frameworks to discover effective epistemological principles to guide curriculum development and allocation of resources. The research methods likely to yield useful results for this work would be drawn from qualitative frameworks because of the insights into specific situations that they provide.

In South Africa the disabling socio-historical context of education has disrupted organisational norms taken for granted in stable environments. This disruption has impacted negatively on learning conditions for 'over-age' learners whose progress has consequently been further retarded. For them, real access to education demands attention to effectiveness and to the quality of learning conditions before meaningful participation in the global economy, the goal of major development agencies, can happen. Attention to effectiveness before efficiency in this context can be described as redress as targeted development rather than redress as equity, because equity as practised through formulaic distribution is not a helpful notion for non-standard subjects.

### *2.3 Pressures on Policy*

The following paragraphs attempt to identify pressures on policy that ultimately cause tensions in policy implementation.

#### *2.3.1 Rights discourse*

The event that has exercised the most disruptive power in epistemic continuity in education in South Africa has been the interpolation of a human rights discourse into the education environment. Basically, the Bill of Rights has reduced the power of the state to position

citizens arbitrarily and has created conditions for citizen-agency. The question of agency therefore becomes the touchstone by which transformation of epistemic conditions in line with the new rights dispensation should be measured.

Two distinct imperatives appear to be driving efforts to give effect to the realisation of learners' rights in the post 1994 dispensation: equity and redress. Equity demands standardisation and redress demands targeted spending. In the discussion that follows, these imperatives can be seen to be in tension.

### 2.3.2 Equity, redress and standardisation

Glaring differences in past allocation of resources along racial lines and the need for speedy visible redress has determined the policy agenda in education during the post-election period 1994-2000. Redress can either be interpreted as targeted development driven by specific localised conditions or as generally equitable centralised distribution of resources. This choice has a direct bearing on how visible the phenomenon of older learners is allowed to become when budgets are drawn up because under conditions currently prevailing in classrooms, where 'homogenous' sets of learners are provided for, these learners would require costly special attention. Badat (1995: 142) has warned that

*equality and development, as simultaneous social objectives, stand in a relationship of intractable tension.*

Loosely expressed, equality demands measurable, widely agreed upon indices of progress generated by quantitative studies that can yield comparative data, while development in terms of effective strategies requires close attention to context-specific problems that lend themselves to qualitative study. Depending on the political pressures shaping policy decisions at a given time, researchers have to justify the spending of scarce resources on particular projects. A tension develops between efficiency of delivery to as large a number as possible and the effectiveness of specific programmes, such as those addressing the needs of 'over-age' children might require.

Quantitative studies that support equitable redistribution of resources to the majority of school goers tend to derive credibility from the broadest possible sample sizes and most generalisable results. These results are best obtained in environments in which the variables are reduced to a minimum. The problem of 'over-age' learners contextualised in this review is actually generated and perpetuated by this drive for standardisation. Without the narrative of

standardisation there could not be an 'over-age' learner. The term 'over-age' denotes an aberration in terms of a standardised model of organisation that measures efficiency in terms of providing 'inputs' to support predictable 'through-put' tied to age-grade correspondence. The logic of standardisation, supported discursively by metaphors [*input, through-put*] of industrialism, demands that 'over-age' learners be constructed as nuisance variables and eliminated by honing the system. However, according to the constitution they are persons with rights to education. If they are constructed as citizens with rights then they should enjoy conditions that make the realisation of those rights achievable regardless of age. There is no provision in the Schools Act 1996 for withholding education from children who do not conform to age-norm requirements. However, although there seems to be tacit acceptance of this assertion in the language of Curriculum 2005

*Time will no longer control the learning process* (Gultig (ed) in National Department of Education 1997)

no special provision is proposed for them beyond a suggestion that a 'catch-up course' (Western Cape Education Department Assessment committee 1999) be provided. Such a suggestion does not escape its underlying time-bound referent, the linear production line.

Paradoxically, simultaneous with the effort to achieve equity through standardised redistribution, a major epistemological shift, in some ways foreshadowed by the People's Education campaign of the 1980s and early 1990s, is required of schooling by the launch of Curriculum 2005.

The following statement is from Curriculum 2005 Implementing OBE - 1: Classroom Practice.

*Educators no longer simply follow a set syllabus. Although there are outcomes set for all learners, educators have more responsibility to decide what content, what teaching methods, and what form of assessment they will use to guide their particular learners to meet these outcomes.* (Gultig.(ed.) Department of Education 1997).

An inference to be drawn from this statement is that, unlike in the past, educators should be prepared for learners who might be anomalous in terms of standard measurements. Teachers are expected to design context-specific programmes for *particular learners*, a practice that militates against standardised teaching and testing. However, the logistics of redress as equity favour standardising as a way of measuring progress towards 'equality'. This tendency, starkly illustrated by public interest in comparing matriculation results and exacerbated by punitive sounding rhetoric from education officials reported in the press following the 1999



release of matriculation results, is likely to eclipse the need for targeted development of expertise in curriculum innovation and implementation necessary to meet the needs of particular learners. Ironically, although 'over-age' learners are victims of political turmoil, poverty and underdevelopment, they are a category seriously in danger of not enjoying the benefits of redistribution that is being driven by an imperative to standardise in the name of redress as equity rather than as targeted development.

The dichotomy between efficiency and effectiveness in the research literature is mirrored in a dichotomy in policy between a drive to standardise and a will to instantiate a rights-based episteme. The notion of human rights is essentially grounded in the idea that an individual's claim for agency in personal self-realisation cannot be cancelled by the will to power of a hegemonic grouping. In school this would mean that progression should depend on assessment of individual achievement towards outcomes, not on a need felt by education managers to move the majority through the system at a uniform rate, in production-line style. In other words, criterion referenced assessment would replace norm referenced assessment tied to time constraints.

### 2.3.3 Popular discourse and common sense

Common sense has an effect on the playing out of policy. Tatto (1997: 406) remarks on the gap between the recommendations of innovative theories and the realities of teaching practice in disadvantaged schools in North and South America. The implication of her question

*How can teachers and students together learn to understand daily experiences and constructed meanings and use them to reshape education?*

is that new constructions of the relationship between learners and teachers have to be negotiated to effect transformation. In turn, this may mean that current time and space dimensions of practical school organisation would have to be reconceptualised.

A similar gap between the innovative intentions of the framers of Curriculum 2005 and the managers of school resourcing can be seen in South Africa where policy implied in the curriculum is not supported by budgetary and logistical policy. A common understanding of the practical arrangements needed to realise the stated intentions of the new curriculum still needs to be negotiated. In South Africa, these negotiations need to be informed by the spirit of the 1996 Bill of Rights. In other words policy should produce conditions conducive to the realisation of learners' rights, usefully described by Bernstein (1996: 7). This outcome could be confounded by the operation of political agents' uninterrogated common sense that could

label older learners in a way that would deny them a voice at any one of the levels of discourse crucial to negotiating the realisation of their rights.

Ball's (1993) criticism of Ozga's plea for theoretical coherence in policy analysis enables one to see that the common sense operating in local contexts often confounds the coherent intentions of policy-makers. Common sense is produced by a complex distribution of voices and texts modulated by power relations and these distributions in the discursive community play out in the ad-hocery of practice in classrooms. The ad-hocery - common sense - of classroom practice that constructs learners can be seen as traces of responses to the power of differently positioned voices at various levels of the discourse. Unless common sense discourse is revealed and unravelled there is no certainty that a changed construction proposed by designers of the curriculum can be instantiated in practice.

In making sense of the data emerging from the literature review, teacher interviews and learner interviews, I found it necessary to ask how overage learners were positioned in public and institutional education discourse in South Africa. It seemed important to bring to view the common sense assumptions of the lay constituency that was likely to be able to exercise pressure on policy formulation. This concern led me to consider frameworks derived from discourse analysis, a way of structuring interpretation particularly suited to revealing power relations in the discourse that impact ultimately on the structuring of the learning environment for older learners. These power relations are discovered in the operation of common sense discourse, which carries unexamined assumptions that influence decision-making.

The following references to older learners in the popular press illustrate the pressures at work in the discourse of the body politic that is diffused through society in metaphors of common sense. The tenor of this discourse is not dissimilar from that of the lay discourse around learners 'officially' recognised as having special needs. Both versions of the discourse are characterised by

*prejudice, hate, ignorance, fear and even paternalistic tendencies. Much of this has to do with the isolation of people who deviate from the normal physical appearances.* (Naicker in Engelbrecht et al 1999: 14)

Before I undertook a set of interviews with principals in greater Cape Town, an unusual flurry of articles about older learners appeared in the press. I realised that these may have reflected significant influences captured in the common sense of the social context of the older learner that might exert pressure on policy in the metropolitan area and in the province. I decided that the articles were worth interrogating to understand pressures that were labelling and

marginalising older learners in society. My reasons for viewing common sense perceptions reflected in the popular press as significant are explained in the paragraphs that follow.

Everyday knowledge finds its expression in common sense, which Geertz (1983) defines as a cultural system founded on an impulse to render the world distinct, that is, explainable and 'reasonable' in a colloquial sense. The immediacy of common sense dictates that it cannot be strongly classified, but is readily to hand in the course of everyday, spontaneous and practical social interaction. It is often expressed in metaphor rather than logical argument and is held to be self-evident by the subject expressing it.

Geertz further proposes that common sense has become a central category in a wide range of contemporary philosophical systems including Wittgenstein's discourse theory, phenomenology, existentialism and American pragmatism. Social theorists have come to recognise that, far from being unstructured, it operates as an interpretive framework at an unconscious level, regulating relationships and by extension, class divisions.

On a social level, Geertz's assertion that common sense is 'what the mind filled with presuppositions concludes', implies that the collective understanding of common sense precepts, which are interpretive ad hoc accounts of the ways societies live, puts whole societies and their subdivisions of class on particular trajectories. (These trajectories are often intuitively perceived by politicians who are aware of the power of recontextualisation that is the business of education, and who set out to seize control of the processes of curriculum development to instantiate and consolidate power. A discussion of some of the political implications of common sense follows an analysis of popular discourse below).

Bourdieu develops the idea of a mind filled with presuppositions in his notion of *habitus*, which is defined as

*an acquired system of generative schemes objectively adjusted to the particular conditions in which it is constituted.* (Bourdieu in Bernstein, UCT seminar 1997).

In that it is rooted in uncritical, mostly spontaneous interaction with the environment, Bourdieu's version of the phenomenon shares characteristics of Geertz's notion of common sense. Both Bourdieu and Geertz make the point that common sense is learned and tends to encapsulate and perpetuate cultural attitudes and class distinctions between and within societies. Because common sense is essentially conservative, it is unlikely to contribute to forms of social change beyond those that take place incrementally in system reproduction.

At a social level, the implication of these insights for education seen as the development of voluntary agency, is that educators have to engage with the difficult notion of creating the possibility of breaking into the inevitability of a subject's positioning in the reproduction of society, by effecting changes in the collective and individual habitus. The transformations wrought by slow incremental changes of common sense are not consciously agentic on an individual level. Common sense has to be identified and rendered conscious in order to be examined and changed.

Tatto (1997: 405) reports a major global shift in thinking about teaching and learning in the profession of education during the past twenty-five years away from determinism towards theories based on constructivist, developmental, cognitive foundations but that these theories have not yet been absorbed into classroom practice. On a local (South African level), although notions deriving from these theories are implicit in Curriculum 2005, their implications for policy concerning deployment of resources appear not to have been absorbed yet by managing education bureaucracies. In its deployment of resources, management at institutional level still seems to be governed by its *common sense* - traces of past practice - and by the common sense of political role players with a stake in the education budget.

It is important to include consideration of texts carrying common sense assumptions in this study because the gap between theory and practice referred to by Tatto is a significant effect of the power of common sense to resist change in discourse, and therefore in policy, when policy is shaped significantly by public pressure.

In a discussion of situationally (classroom) dependent concepts of literacy and quality in a class engaged in poetry writing, Comber (1997: 395) asserts that

*A negative evaluation of literacy can easily slide into a paired negative evaluation of assumed lifestyle.*

A process similar to that described in this assertion can be seen to operate in the discourse of the headlines of articles reviewed below. Following the example of Fairclough (1989: 108-139) and Janks (1997) I consider that the inclusion of popular discourse is appropriate in this study because of its impact on society's construction of learners who fall behind 'normal' age-determined progression through school. Jupp and Norris (1993: 47) explain that *a discourse does not exist in isolation but in relation to others*. The discourse of the popular press reinforces society's common sense perceptions. These perceptions can translate into political pressure on policy makers.

The effects of globally generated common sense are transmitted through the metaphors [for example, *through-put*; *unit for learner*] of terminology used to enact policy (Fairclough 1989: 119). The metaphors are legitimated by being used by agencies with the power to make and impose policy.

Local common sense is perpetuated by subconscious beliefs that the speaker and audience share a common worldview. Shared understanding of the metaphors legitimates the discourse at this level. The source of the language constructing the phenomenon, agencies with power, is not questioned.

Fairclough (1989) offers a method of analysis that demonstrates the power of mass media to shape and reproduce the ideological common sense of communities. Ideology hidden in the common sense of communities drives and constrains political action.

The press headlines analysed below are illustrative of some of the assumptions operating in the body politic of the Western Cape.

#### NO ACTION DESPITE REPORTS

Teen rapists still in primary school

**NO PLAN** exists to deal with children who make no progress in primary school, so teenagers wind up in school with small children, leading to abuse. **FATIMA SCHROEDER** reports. (*Cape Times*, March 16 1998)

Front page:

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*Hidden shame of school system*

*He's 15, but can barely read or write - after nine years at school, thousands like him are falling through the cracks.* (Cape Times March 18 1998)

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*Quoted by a reader from Cape Times editorial April 2 1998:*

*"Kindergarten drop-outs*

*Nearly all from poor communities, these drop-outs start out in life illiterate, with no prospects, little hope of later employment and are virtually condemned to the*

*poverty spiral. Little wonder that a large number are drawn inevitably into a life of crime. Few other options are open to them."*

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Fairclough (1989: 112) suggests that the interpreter of a text should look at three types of value in a text's formal features: experiential, relational, and expressive.

Experiential value refers to how ideology is coded in the vocabulary of the text. The headlines quoted above conflate illiteracy with social pathology (*teen rapists still in primary school*), consigning the subjects to an almost untouchable class. Trajectories, as well as identities are constructed for the learners. Power to exclude by labelling, perhaps power even to shape the realisation of the trajectories, resides in those adults who attach moral value to progression through school within the acceptable time frame.

Relational value refers to the social relationships constructed by the text between participants: the producers and interpreters of the text. The producers of the headlines claim a common understanding between themselves and their readers of the positioning of the 'over-age' learner as deficient. The nature of schooling is not questioned because both parties are alumni of the same school club (mono-age). Because the phrase *through the cracks* expresses just a fragment of the metaphor used to describe an entire education process, one can assume that the producer and interpreter of the text understand the conceptual construction of the school system in the same way because they both know what the fragment is referring to. This common understanding has found its way into the Schools Act via political processes that represent the body politic's interpretation of an ideal desirable dispensation. The ideal is predicated on the industrial model that most political role players have experienced themselves in the past.

Expressive value refers to evaluative positive or negative connotations of language for the interpreter. The words *hidden shame; condemned*, with their negative connotations of insidious social disease that could and should have been prevented, imply a moral and physical threat to the schooled community. Unsurprisingly, the response of the reader who quoted from the April 2 editorial in his letter is that these learners should not have been born in the first place!

The literate newspaper-producing and reading community represented in these examples only questions the efficiency in terms of *through-put* of the system that rendered themselves literate, not the efficacy of the assumptions underpinning its management and that failed the

learners in question. Given that the media play an important role in the reproduction of common sense values, they can be said to bear a significant degree of responsibility for the negative construction of over-age learners in the perceptions of the literate element of society that enjoys political hegemony in the Western Cape.

This limited analysis of articles in the local press suggests the kind of pressures generated at societal levels that are able to impact on institutional policy, and which may have played out in marginalising practices in the school situation. In other words, the positioning of older learners in schooling could have been an effect of the distribution of power relations in education discourse at societal, institutional and situational levels.

#### *2.4 Policy: analysis*

In this section of the chapter relevant clauses in policy documents are analysed and contradictions between intentions inherent in the implied epistemology of framers of policy and the actual stated strategies for implementation that are recommended are revealed.

Policy documents mentioned below have been framed to guide the management of education at levels of discourse from macro (societal and institutional) to micro (situational):

1. Societal - Bill of Rights in the Constitution Act 108 of 1996
2. Institutional - Curriculum 2005; the National Qualifications Framework; National Commission on Special Education Needs
3. Situational - the Schools Act of 1996, which deals with school governance.

Elements of these documents that are specifically relevant to older learners will be discussed in the paragraphs that follow. An attempt will be made to discern where the documents sit in relation to the pre-1994 episteme of the old order and emerging epistemic conditions, especially with regard to issues affecting learner-agency - Rights - and the positioning of the learner's identity. In terms of a rights based episteme, conditions should be experienced by learners as unequivocally inclusive.

##### *2.4.1 Societal level - Bill of Rights*

Although the spirit of the clauses specifically relevant to the older learner's rights is inclusive, the letter of the Bill makes it possible for those rights to be suspended, with possibly enduring

negative consequences for the learner. This is done by framing claims within scenarios that limit their application.

In clause 28 (1)f (i) and (ii) the child's right to education is framed within a prohibition against exploitative labour practices, not stated explicitly enough to place an obligation on the state to provide each child with appropriate and effective learning conditions:

*Every child has the right-*  
*(f) not to be required or permitted to perform work or provide services that-*  
*are inappropriate for a person of that child's age; or*  
*place at risk the child's well-being, education, physical or mental health or*  
*spiritual, moral or social development.*

The way the clause is framed exonerates the state system from blame if the cause of the child's being at risk is because the system itself excludes the over-age learner from effective access by not creating suitable epistemic conditions. Risk is seen as coming from the world of work outside the institution of education, although exclusion from effective schooling by the school system itself may present at least as serious a threat to spiritual, moral or social development as child labour does.

In clause 29 the Bill of Rights unequivocally asserts the individual's right to a basic education but frames specific requirements to effect, where *practicable*, (a) *equity* and to (c) *redress the results of past discriminatory laws and practices*, within language rights. Again the state is exonerated if age, rather than culture or race, excludes the learner from the educational institution.

It appears that the framers of these clauses were still operating within the old episteme that reified work and race (language being an aspect of racial identity in pre-1994 South Africa) as interpretive and evaluative categories when scrutinizing social practices. Their perceptions had not shifted sufficiently beyond the epistemological assumptions of the old dispensation to see that the old episteme's ordering metaphor - division of labour based on race classification - if unrecognized, could perpetuate discrimination. It could do this by assuming the legitimacy and inevitability of age-stage synchronicity, ordering principles of former education management buried in their own common sense. The categories used to frame the clauses cited above still construct learners as being unfortunately positioned in terms of the old categories, but not as potential agents with unconditional rights of access to the system. The old categories obscure the validity of the teenage illiterate's claim for special attention in the schooling system.



## 2.4.2 Institutional level

### 2.4.2.1 Curriculum 2005

The National Department of Education (NDE) guide *Curriculum 2005: Lifelong learning for the 21<sup>st</sup> century* (Gultig (ed.) in NDE 1997: 2) places the curriculum squarely within the paradigm of a transformed episteme by mentioning age and time specifically:

*For the first time ever, high quality education will be available for everyone - irrespective of age [my emphasis], gender, race, colour, religion, ability or language.*

For teenage illiterates in primary school, *high quality education* would have to pay attention to their developmental needs, some of which, namely spiritual, moral and social, are mentioned under Children's Rights in the Bill of Rights. A considerable research tradition supports the perception that these developmental categories are inextricably interwoven with cognitive development, which means that it would be false to assume that programmes designed for adults in an essentially adult environment would be adequate to meet the needs of older (adolescent) learners currently in primary schools. More specific detail in this regard emerges in the course of my analysis of interviews in following chapters.

The guide also refers specifically to learning conditions under the heading *There are several key principles*:

*A great emphasis is put on creating conditions that lead to success* (Gultig (ed.) in NDE 1997: 2).

One of the key principles underpinning learning conditions alluded to above is the attitude to time:

*Time will no longer control the learning process. This means that not all learners will succeed at the same time. Instead, learners will be able to develop at their own pace* (Gultig (ed.) in NDE 1997: 2).

This principle is reiterated in *Building a Brighter Future: Curriculum 2005 Questions and answers for learners, educators, parents and governing bodies*:

*Learners progress towards the mastery of outcomes at their own rate, and therefore at different rates* (Gultig (ed.) in NDE 1997: 10).

These principles affirming the legitimacy of individually paced progress towards a level that makes agency possible - *mastery* - do not translate easily into policy on school management, causing dissonance between the Curriculum and the Schools Act, which becomes clear when clauses in the act dealing with over-age learners are examined.

Pedagogy and assessment that enable individuals in a single learning environment to proceed at their own pace have their roots in an epistemology that understands knowledge as the product of individual processes, not as a selection of entities prepared for transmission.

The dilemmas discussed in these documents point to a fundamental tension between policy that claims to derive from an emancipatory, learner-centred epistemology, and the practicalities of implementation that perpetuate a different episteme. Keeping learners in cohorts militates against the enabling notion of criterion-referenced assessment. Progression is not based on the purchase an individual achieves in the system, but on the learner's identity as a member of an age-based peer group.

The complex relationship between time, progression, assessment and age-referenced school management is tackled in a document issued by WCED Curriculum Services to help educators implement assessment policy. It suggests that grade and age norms be uncoupled to give substance to the principle of learner-determined pacing of progress:

*2.1 ... The next implication of [no time limits] would be that labelling a class Grade 1,2,3 etc has less and less meaning. Schools may even consider defining a class in terms of new markers. For example the Grade 1 group of 1999 might be called "Class of 1999" on arrival and retain that name for the whole span of their stay at school. (Schlebusch, Mentz and Semmerlink 1999).*

The following clause of the National Assessment Policy shows up the difficulties raised by the effort to keep age cohorts together while trying to implement outcomes principles:

*From the beginning of the General Education and Training Phase (grade R - Grade 9) progression will be with age cohort as a general rule. Where it is felt that a learner needs more or less time to demonstrate achievement then this will be negotiated by the relevant role-players (eg teachers, therapists etc, learners and parents) with the parent making the eventual decision. It may be that the parents themselves need a mediator to help in the decision-making - this would be a process expedited by the provinces according to their own provincial structures (eg subject advisors, inspectors etc). The extra time needed by the learners will not automatically be a whole year (as in the present concept of pass / fail) but could be something like 3 months, 6 months etc or could refer to certain aspects eg of skill development and not to others. As a guideline no learner should stay in*

*the same phase for more than four years* (Schlebusch, Mentz and Semmerlink 1999: 6)

At least two factors would be likely to render these arrangements unsustainable. Firstly, the clause does not specify where the 'extra time' would come from, time being a finite resource: would the help happen outside of normal school time or would the learner forfeit time in one area to expedite progress in another? How many learners in a cohort would require different time arrangements and would they become a sub-set within the cohort? What would the social consequences of differentiation within the cohort be? How might labelling - 'slow', 'normal', 'fast' - affect self-concepts, social relations and epistemic engagement?

Secondly, an unrealistic plethora of role-players, professional and lay, become involved in the process of adjusting the learner's time frames, but the final decision is in the hands of the laity anyway, the parents. Criterion-referenced assessment by professionals gives way to subjective evaluation of educational needs by parents. The authors of the clause do, however, recognise the power of affective responses to exclusion to disrupt learning conditions irreparably for the learner. This recognition suggests that responsibility for the affective effect of marginalising slower learners in relation to their cohorts by singling them out as exceptions to the rule, is one that the system wants to avoid by handing the power to decide to parents.

The policy's dilemma, reflected in the obfuscating and frequent use of *etc*, in the buck-passing and lack of clarity on how extra time is actually sourced, is entirely created by the assumption that the only possible mode of school organisation is the standardised time-governed mass production line. The resort to the old conception of time in the final line of the above quotation means that the framers of the assessment policy cannot escape the trap of mass lock-step promotion. In an explanatory note the WCED document issues an injunction to

*Remember that the traditional concept of "grade" is being challenged here. The word "promotion" is no longer to be used. "Progression" is with the age cohort. The need for more or less time is to be negotiated. Only under very rare circumstances should a learner be expected to "repeat" a year as in the traditional understanding of this (ie the learner repeats a whole year of work, does not proceed with his/her peers to the next year of schooling).*

In practice progression linked to the age cohort referred to above amounts to social promotion with band-aid and is incompatible with progression based on criterion referenced assessment of achieved outcomes. However, some of the solutions suggested in 5.2.2 of the WCED document to the problem of structuring available time in terms of the new episteme offer

escape from the production line metaphor. The following suggestions are noteworthy because they would allow authentic assessment of individual progression to dictate pace.

v) *Set up timetable blocks - for example all grades busy with, say, "Research" at the same time - so that mobility between groups is facilitated.*

vi) *Have modular options where what is important is what is being done and not who is doing it across the whole phase as the norm. This is an extension of the model of workstations in one classroom into a concept of workstations per phase.*

The further suggestion that cross-age tutoring be encouraged assumes that older learners will be able to support younger ones with language learning needs. In the intermediate phase where English is often the preferred medium of instruction in previously disadvantaged schools this may not be the case because many of the older learners come from a unilingual rural background.

#### 2.4.2.2 National Qualifications Framework

The mechanism intended to give practical effect to the post 1994 government's promise to accommodate lifelong learning and the universal right to education is the National Qualifications Framework. Principle 8, relating to access, is crucial to older learners in primary school because of the particular developmental needs of adolescence:

*Provide ease of entry to appropriate levels of education and training for all prospective learners in a manner which facilitates progression.*

This principle places a responsibility on pedagogues to create conditions and use strategies that enable learners to make measurable progress in terms of their own development, not on learners to conform to arbitrary norms and timescales. What exactly 'progression' is, and how it is assessed are crucial to interpreting the needs of adolescents emerging into literacy and in shaping appropriate learning environments and programmes for them.

Osin and Lesgold (1996) propose a model for reengineering the school system to uncouple age from grade norms. Their rationale resonates closely with the principles of the NQF (Appendix 1), which is designed to enable learners to overcome the disadvantages of having been unable to conform to age normal progression in the formal state education system. The synchronicity between the documents lends credence to the possible relevance of the proposal in the South African context and deserves close attention.

Osin and Lesgold's primary motivation in proposing radical restructuring of educational systems is to reduce wastage in the system. Wastage is construed by them as time wasted by fast learners who could move through the curriculum much more rapidly than at normal rates, or who could learn independently at more complex levels than their age peers. They conclude that enabling independent learning at different rates would free resources for slower learners who accumulate deficits exponentially in age-referenced classes because their learning is always incomplete, and who would benefit from the increased attention from teachers whose competent learners could move on. Although Osin and Lesgold's motivation was primarily to help faster learners by freeing them from age-bound lock-step time management in schooling so that younger learners could progress more quickly, their proposal to uncouple age and grade would also offer escape from negative positioning - caused by being seen as aberrant in terms of age - for older and slower learners.

Practically speaking, the proposal is to develop a computer-based infrastructure that would create a national database of projects graded according to learning levels. Individual teachers would not be expected to develop projects on their own. A large collection of projects produced collaboratively would be mapped, in terms of cognitive achievement, over existing curricular strands (Osin and Lesgold: 641). These projects could be adapted to local conditions. Learners would be able to complete variable numbers of projects individually, in pairs or groups, according to their own pace to ensure that learning processes were followed through all phases of cognition. In the local South African understanding of the term, assessment would be **criterion**, not norm referenced.

#### 2.4.2.3 National Commission on Special Needs in Education and Training

In the context of development of policy for learners with special educational needs undertaken by the National Commission on Special Needs in Education and Training (NCSNET) and the National Committee for Education Support Services (NCESS) Naicker (1997) proposed that a paradigm shift in the way education for learners with special needs was conceptualized was underway.

Naicker (1997 and in Engelbrecht et al 1999) suggests that special education practices have been informed by four main kinds of discourses in South Africa: medical, charity, lay and rights. The shift from framing special needs education in terms of a medical discourse to meeting criteria for full citizenship in terms of a rights discourse leads logically towards inclusive practices. However, the Commission's terms of reference (Engelbrecht et al 1999)

make it clear that, in addition to normal mainstream provision, targeted assistance for special needs learners will be an important element of inclusive practice:

- *The immediate and long-term national and provincial needs and strategies for the education of learners with special needs in education*
- *The support structures required by the Minister of Education, the provincial Ministers of Education, the departments of education or any other relevant authority for implementation of the strategies.*

It seems that because the concept of 'older learner' was not framed within the discourses mentioned by Naicker, but generated and labelled as *dropout* and *repeater rates* by the discourse of the mainstream system itself, the claims of these learners for more specifically appropriate pedagogy may continue to be unheard even when the paradigm shift has taken place for 'disabled' learners. The current labels define the identities of the learners in terms of their relationship to an unreconstructed conception of the production line called Schooling, a relationship that is conducive to their continued accumulation of learning deficits over time. It appears that older learners are not seen as special needs subjects until they suffer some physical or social trauma that admits them as subjects into one of the categories of discourses suggested by Naicker. For example, I attended a workshop convened by the Educational Support Services Trust (ESST) and sponsored by the Child Welfare Society (Cape Town, April 1999), at which older learners were discussed as part of a syndrome that produces street children - the charity discourse. Although the representative from the Western Cape Education Department (ELSEN directorate) expressed a need to see the syndrome within an inclusive paradigm rather than from the point of view of the problem, and the representative from POLP located her organisation's work in the area of prevention, both positions that offer escape from the charity discourse into mainstream thinking, representation by mainstream education officials and politicians holding education portfolios was conspicuously absent in spite of having been invited to participate. It seems to me that if older learners find their way into mainstream schooling, it may be via medical or charity discourses. This route perpetuates the notion that 'overage' indicates deficiency in the learners, rather than dysfunction in the system.

#### 2.4.3 Situational level – The South African Schools Act No. 84 of 1996

Tensions in the current episteme are most obvious in the Schools Act. Standardisation is foregrounded in the first paragraph of the act, namely, in its purpose statement:

*To provide for a **uniform system** [my emphasis] for the organisation, governance and funding of schools* (Government Gazette No. 17579 of 1996: 5).

The preamble contains phrases that resonate with the curriculum guides discussed above:

*WHEREAS this country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities, advance the democratic transformation of society, combat racism and sexism and all other forms of unfair discrimination and intolerance, .....uphold the rights of all learners....*

But the solution to problems of redress and provision of high quality education, which must surely include appropriateness, is seen in achieving standardisation throughout the system:

*WHEREAS it is necessary to set uniform norms and standards for the education of learners at schools and the organisation, governance and funding of schools throughout the Republic of South Africa...*

Logically, the word *uniform* militates against the likelihood of learners rendered anomalous by the system to be able to claim their rights in the ensuing conditions. The following provisions specifying the age range of learners eligible for compulsory state-sponsored education are particularly problematic for older learners:

*3.1.1 ...until the last day of the year in which such a learner reaches the age of fifteen years or the ninth grade, **whichever occurs first** [my emphasis].*

Unless all overage learners are declared to be learners with special needs their inclusion in the school system for a full period of compulsory schooling available to normal age groups is precarious, as was the case in the less disrupted education departments (House of Assembly and House of Representatives) under the previous regime.

Two clauses in section 5 seem to be contradictory when applied to the situation of older learners:

*5 (1) A public school must admit learners and serve their educational requirements without unfairly discriminating in any way.*

*5 (4) The Minister may by notice in the Government Gazette, after consultation with the Council of education Ministers, determine age requirements for the admission of learners to a school or different grades at a school.*

Section 5 (4) nullifies the key principle of time in Curriculum 2005 and sets the curriculum developers, part of the professional field, in opposition to political role players who are

sensitive to pressure emanating from the common sense of the body politic because of the processes producing their participation in the field of education. The framers of the Act, unlike the framers of the Curriculum, derive their authority from the electoral process. They are likely therefore to be swayed by how society constructs an issue rather than by professional opinion. The outcome of the contest will depend on the relative distribution of power in the discourse between these two orders, professional and political.

Alternatively, Potter (1995) suggests that there are four aspects of national life that should be instantiated in curricula across the country: (1) common citizenship, (2) access to a common political process, (3) a common legal system, (4) access to a common economy. Beyond these, he concludes that the provision of diverse forms of education is necessary for realising learners' rights to enhancement (Bernstein 1996):

*the state might well consider...allowing schools to maintain special emphases of local significance...The state might, for instance, in return for some decentralisation of choice of language, religion and sport, gain the cooperation of schools in helping students to a quality appreciation of the aspirations, attitudes and values of other groupings within South African society. Certainly, it would be predicted that acceptance of such inclusions in the curriculum would be more likely gained by this type of trade-off strategy than by the forceful imposition of a rigidly state-controlled unitary school curriculum. (Potter 1995: 325-326).*

In addition to language, religion and sport, there may be other social and cultural issues that impact on learning conditions in different localised contexts. Alternative logistical arrangements tailored to the needs of local contexts that generate phenomena such as 'older learners' could also be considered.

#### 2.4.4 Conclusions and discussion of literature and policy review

An exploration of the literature led me to believe that 'over-age' learners are designated as such because their identities are constructed through a commonsense discourse of standardisation that draws on the language of industrialism. They are likely to be treated therefore as a systemic problem to be eliminated as a category by improving the efficiency of the system's management. At school level this approach can be expected to play out in a 'conform or leave' attitude in school managers, which does not take account of or provide for the particular psychosocial developmental needs of adolescents in a primary school setting.

Education policies in South Africa may be misdirected if based on models drawn from developed economies. The assumption (that access to education is homogenous in age terms)



underpinning the industrial model of mass education management that enjoys hegemony in developed economies does not take cognisance of the complexity of South African situations. Unless more attention is paid to context-specificity, including the diversity of cultural, language, geographical, historical and socio-economic backgrounds of learners, certain categories of learners may find that the conditions necessary to engage effectively in the education system do not exist for them.

It is arguable that if conditions for older learners in primary school are not conducive to their learning, their constitutional right to a basic education at a critical stage of their development is denied. To help 'over-age' learners, working definitions of redress and its relationship to rights, learning conditions, equity and development need careful attention. As a first step, their identities might need to be found by means other than the standardising discourse that vaporises them as legitimate flesh-and-blood claimants in the system. I argue that it would be useful to bring them into view by exploring their positioning in inter-related levels of social discourse (Fairclough 1995:46) in relation to their frames of reference constructed by their own biographies because this approach would legitimate paying attention to their subjective experience, both as actors and as acted upon.

Bernstein (UCT seminar 1997) has asserted that schooling mythologises biology by applying biologically based psychosocial maturation theories to age norms in school management. The concept of 'over-age' is produced by coupling stage theory to standardised age norms expressed as grades. Metz (1997:161) has criticised the cognitive developmental research tradition for constraining children's progress by attributing shortcomings in performance to the children's stage (expressed in schooling as age) rather than considering the effects of a weak knowledge base and the complexities of variability and change. Cognitive developmental researchers have tended to assess static stage characteristics by using what she calls 'snapshot' methods of data collection that do not take account of changes in children's understanding facilitated by mentors. Metz points out that studies encompassing change show that children's reasoning is dynamic and variable. The relationship between emotional, social and cognitive development is also variable, and dependent on how these states of being are mediated by the learning situation.

In addition to exploration of the literature, a review of policy reveals further disadvantaging effects for older learners.

The South African Schools Act No. 84 of 1996 in **Admission to public schools** (Section 5), while stating in its preamble an intention to **uphold the rights of all learners**, does not

protect access to education in public schools for minors under 16 who are more than three years out of sync with school age norms. There is a contradiction between the requirement in 5(1) not to **unfairly discriminate in any way** and in 5(4) **The minister may....determine age requirements for the admission of learners to a school or different grades at a school**. Section 5(5) gives governing bodies powers to determine admission criteria to a school, qualified only by clauses relating to fees, learners' relationships with school ethos and liability for damages. Members of governing bodies who accept common sense constructions of learners that militate against their access to schools are not obliged to critique and amend their objections to admitting 'over-age' learners in order to avoid unfair discrimination.

Curriculum 2005 is clear about its learner-centered orientation:

*A great emphasis is put on creating conditions that will lead to success.....*

- *All learners will succeed. Time will no longer control the learning process. This means that not all learners will succeed at the same time. Instead, learners will be able to develop at their own pace. (Gultig (ed) in National Department of Education 1997: 12).*

The law is less clear about what is meant by a **uniform system for the organisation... of schools (preamble to Schools Act 1996)**, because the current common-sense interpretation of uniform implies standard and this places school governance and the conditions required for the successful implementation of Curriculum 2005, especially with regard to learners' rights of access, in opposition to each other.

The tension between the law and the curriculum is reflected in the following paragraph from WCED document on **Recording and Reporting: policy with regard to reports, portfolios and profiles** (Schlebusch et al for WCED Curriculum Services 1999):

*When an "over-age" learner enrolls at a school, a number of OBE principles come into play:*

- *All learners have the right of access to education.*
- *The learner could be assessed for prior learning and be placed in an appropriate group.*
- *The learner could be put on a catch-up course to progress faster in order to be placed with his/her age cohort. (Schlebusch et al: 8)*

Firstly, the directive is not clear about whether the principles suggested above represent separate options or one sequential process. Secondly, the directive is ambivalent about the power relations in the pedagogic relationship and thirdly, does not escape from the commonsense assumptions behind age-norm referenced schooling.

If the suggested courses of action represent separate options then there is room for creative interpretation of 'appropriate group'. The school could decide each placement according to individual circumstances. There might be opportunity to escape age-referencing. The school could also offer an accelerated programme as an alternative to other placements. If the clauses are sequentially linked, the bureaucracy retains control of the learner's placement. Although the learner cannot be excluded from schooling, his/her prior learning would be scrutinised in terms of where s/he might fit the system, and if s/he did not fit, the learner would be expected to accelerate until an age-appropriate fit was achieved. Until this was accomplished the learner would be constructed as deficient in terms of the mean grade level of an age-referenced cohort. Although the tone of the directive is tentative - the learner **could** - there is no suggestion that the system could be reconceptualised to help learners to progress at their own genuine pace, a principle asserted unambiguously in the curriculum guidelines. Rather, the emphasis is explicitly on progression with the age cohort.

The ambivalence of the bureaucracy about the status of the learners in question and the power of schools to find their own solutions is evident to an interpreter of the text firstly, in the choice of the term over-age rather than older; secondly, in legitimating the term by using it without the use of inverted commas in the heading, and thirdly, by punctuating it in a way that renders its meaning dubious in the text. These contradictory linguistic devices express some doubt about where the power to act actually lies - with the school in response to its perception of what Curriculum 2005 requires or with the bureaucracy charged with organising a uniform system (Schools Act 1996). The directive appears to acknowledge the injustice in the term 'over-age' in punctuating it to cast doubt on its validity, but does not cross the Rubicon of organisational change that must flow from the shift from norm to criterion-referenced assessment.

Viewed together, the documents reflect incoherence in policy attempting to influence epistemic conditions in schools because the language of Curriculum 2005 and of the Schools Act 1996 is contradictory, and not resolved in departmental directives.

Common sense understandings of ideal school conditions and management in popular discourse perpetuate a climate of discrimination and prejudice against learners who do not conform to age norms. The pressures on politically responsible bureaucrats to operate in terms of the episteme suffused through the common sense of a society play out in conservative practices and a reluctance to effect radical change.

The mediation that happens in a learning situation may necessitate an analysis of common sense operating in the institution of education, especially among teachers, and of the relationship between common sense shaping interaction in the classroom and assumptions underlying policy imposed by academic and administrative educational authorities. It is possible that in the processes of enactment of policy the assumptions of age-stage theory drop out of the conscious, explicit everyday discourse of teaching, but continue in mutant and unexamined versions, to exert an influence on teachers' perceptions through management systems locked into simplified interpretations of developmental theory.

By linking an exploration of literature and a review of policy I have concluded that it appears that the framing assumptions of both discourses conspire to disadvantage learners who do not conform to the grade-age norms of schooling.

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### 3.1 Aim

The aim of the project, as stated in chapter 1, was to investigate the conditions of learning for overage learners in some disadvantaged schools in the Cape region. This aim led me to explore their positioning in discourses of schooling at societal, institutional and situational levels of participation. Policy and common sense discourse, representing institutional and societal levels of discourse, have been discussed in chapter 2. This chapter describes the methodology followed to investigate the situational levels of discourse reported in chapter 4.

Having discovered (as clarified in the preceding chapter) that:

- there is a paucity of research literature on older learners, specifically adolescents, in primary schools;
- there are negative perceptions of older learners in common sense public discourse; and that;
- there is ambivalence in policy documents about whether they have a legitimate right to be in primary schools,

I decided to explore the discourse of older learners themselves, and that of teachers and principals, with regard to their positioning in school situations. By proceeding the way I did, I was following guidelines suggested by Layder (1993).

Layder (1993: 129) proposes that the researcher provide a background or sensitising concept that would provide *provisional pointers to relevancies in the data without imposing a 'closed net' on the research as a whole*. In my literature review, I noted metaphors derived from industrialism, including schooling as a production line, and these have provided a background for relevance. To bring macro and micro levels of the investigation closer together Layder proposes (1993: 8, 72) that research elements should include references to the subject's context, setting, situated activity and self. These sources of information can be viewed as belonging in a similar continuum as that suggested by the categories of societal, institutional and situational levels of discourse. He also asserts the importance of paying attention to history (1993: 66-67); to biographical information (1993: 116); and to analysis of government documents (1993: 117). I have paid attention to history by alluding to it in chapter 1, governmental documents in chapter 2 and biographical material in chapter 4.

Data gathered from teachers and principals are presented thematically, while data from learners themselves are presented as portraits. The 'Margaret' story is larger than the others because I found this interviewee to be exceptionally reflective and able to articulate an

epistemological perspective, giving me valuable and moving insights into the actualisation of concepts of identity, agency and inclusion in her life story.

### 3.2 Research design

This project is described in its title as a *qualitative exploration*. This means that it falls within the paradigm of qualitative research and is therefore primarily concerned with insider perspectives. The researcher understands this to mean that the approach precludes the setting up of controlled environments or the elimination of variables between subjects because the perspectives being investigated are recognised as unique to the subjects. Questioning should be open enough to allow both subjective differences and common themes to emerge. The researcher begins with questions, not hypotheses, and the process of analysis is inductive. It also implies that no claim is made that the findings are generalisable, except by analogy.

The following section of this chapter represents an attempt to define the descriptors *qualitative* and *exploratory* as they apply to this particular project. Neuman (1997: 19-20) suggests that exploratory research is a sub-genre of qualitative research.

#### 3.2.1 Qualitative exploratory research

Denzin and Lincoln (1998) propose that qualitative research is surrounded by a *complex, interconnected family of terms, concepts, and assumptions* (1998 vol 1: 2). During the course of its evolution it has become interdisciplinary, has cut across research traditions that have emerged to define the nature of research at particular moments of history, has blurred genres and is essentially *multi-method in focus, involving an interpretive, naturalistic approach to its subject matter* (op cit: 3).

Denzin and Lincoln's description of the qualitative researcher leads one to believe that the researcher acknowledges the insertion of the self into the context of the phenomenon as being *in medias res* (into the midst of things). Research then becomes an interactive process of making sense of the data from the point of view of the researcher.

The researcher is described as a *bricoleur* (op cit), who uses whatever *strategies, methods, or empirical materials as are at hand* (Becker, 1989 in Denzin and Lincoln 1998 vol 1: 3). This stance produces

*bricolage, a complex, dense, reflexive, collagelike creation that represents the researcher's images, understandings, and interpretations of the world or phenomenon under analysis. This bricolage will... connect the parts to the*

*whole, stressing the meaningful relationships that operate in the situations and social worlds studied* (Weinstein & Weinstein 1991: 164 in Denzin & Lincoln.1998. vol 1: 4-5).

Qualitative research does not privilege any methodology over another and *has no theory, or paradigm, that is distinctly its own* (Denzin & Lincoln .1998. vol 1:5). Methods may be drawn from a wide range of contexts and discourses in the humanities. Each of these methods *bears the traces of its own disciplinary history* (op cit).

The primary focus of the researcher's attention is on the relationships revealed in the subjects' texts. This may mean that the schematic coherence of the text may appear to be more submerged in the analysis than it would be in positivist texts.

This account of qualitative research is very similar to what Neuman (1997:19-20) describes as exploratory research, and to what Giddens(1993: 679) says

*The preceding sequence of steps [define problem, review literature, hypothesize, design research, carry out design, interpret results, report findings] is a simplified version of what happens in real research projects. In real sociological research, these stages rarely, if ever succeed each other so neatly, and there may be a certain amount of sheer 'muddling through' (Bell and Newby, 1977). ....Following fixed schemes can be unduly restricting; much of the most outstanding sociological research could not readily be fitted into the sequence just mentioned*

### 3.3 Self as researcher

A number of initiatives to research particular aspects of the phenomenon as part of larger projects did not materialize so that I had to formulate the project entirely myself. This meant that my previous experience and academic history defined the nature of the research design.

Because my teaching experience in schools had been confined to the rigidly standardised environment of ex-House of Assembly ('white') schools I had no previous experience of the phenomenon and therefore could not offer a well-founded hypothesis. The only option was exploration. My previous academic experience was in literary discourse and did not include an education degree: only a one-year postgraduate diploma in secondary teaching. The outcome of this situation was to attempt to generate theory and raise questions, not to test theory.

It seems reasonable to infer from the proposition that methods chosen from a wide range of contexts and disciplines bear traces of their disciplinary histories, that the researcher brings

her own disciplinary background to bear on the research design and execution. In my case, the methods at hand come from literary discourse.

Full time employment and the withdrawal of study leave benefits by the WCED dictated that I would not be able to use methods such as participant observation, action research or case studies that required me to spend protracted periods of time out of my own classroom. I decided to investigate the phenomenon by interviewing subjects in settings where I had observed it and to which I had access in the course of my work, which included observing preset and inset students at teaching practice in township schools while they were studying at Cape Town College of Education. In addition, I had access to a secondary school in a Karoo township where more than 50% of the Grade 8 class was 'overage' and to a rural education project where there was a high incidence of the phenomenon.

The consequence of these factors is that the process that emerged was inductive and the methods used in analysis tended to be drawn from literary discursive practices. My perceptions and conclusions have been shaped in a major way by analysis of the reported experience of the subjects.

### 3.4 Participants and settings

The choice of subjects and sites was governed by a concern to assemble multiple points of view and to construct a portrait of the range of possible perceptions. I consider this strategy to be valid for two reasons: firstly, multiple points of view answer the need for triangulation; secondly, each perspective is a signifier for a further potential area of study. One of the aims of exploratory research is to point to possible contingent sites of research.

*...no individual or case is ever just an individual or a case. He or she must be studied as a single instance of more universal social experiences and social processes.... Thus to study the particular is to study the general. For this reason, any case will necessarily bear the traces of the universal; consequently, there is less interest in the traditional positivist and postpositivist concerns with negative cases, generalizations, and case selection. (Denzin & Lincoln 1998: xiv-xv).*

Because the focus of the inquiry was learning conditions for older learners in previously disadvantaged schools, data collection was limited to a sample of these sites. Sites were chosen because the experience of significant numbers of older learners was located in them and because I needed to access a variety of sites. They included

- a secondary school in a Karoo township attached to a small to medium sized town;
- a primary school run by a rural community education trust on a farm;



- four urban primary schools in Xhosa-speaking township communities;
- one multi-lingual primary school that served a mass low cost housing development and was managed by a non-Xhosa speaking principal.

All the urban primary schools were located in greater Cape Town: Khayalitsha, Philippi and Delft.

The rural and semi-rural schools and the atypical (multi-cultural) township school were meant to provide distal elements that could be used to throw factors possibly obscured by the complexity of urban settings into relief. I was interested in whether there were conditions affecting older learners that could not be attributed specifically to the pressures of urbanisation.

The site of the first set of interviews that I conducted was a Karoo township co-educational school catering for mainly Xhosa speaking learners and had an enrolment of 978 in July 1998. There were 184 learners in Grade 8, 82 males and 102 females. I had chosen this site to start the investigation because the phenomenon of older learners was particularly strongly represented there.

According to the school's EMIS no.23403 returns that specify age distribution:

- 90 learners in Grade 8 fell into the normal age category of 12 - 15 years old (female 48; male 39)
- 73 learners were between 16 and 18 years old (female 40; male 33)
- 21 learners were between 19 and 21 years old (female 11; male 10).

Therefore 51% of the learners in Grade 8 were 'over-age'.

I interviewed three Grade 8 teachers in the Karoo township secondary school:

Ms X (Geography and Guidance)

Ms Y (Mathematics)

Ms Z (English).

Having heard various teachers' points of view on the positioning of learners, I decided to hear what a sample of learners had to say about their experience of schooling, and about their home situations and aspirations. The second set of interviews was conducted in a rural community education trust project in the northern Karoo. The project includes pre-school to Grade 9, Adult Basic Education and Training and skills training. I chose this site for its accessibility and also because it provided the only real access to formal learning conditions in the environment of the learners. The set of interviewees included six learners, four of whom

were more than five years older than the age norm for their grade and were experiencing difficulties, and two of whom had moved on to further education at other institutions and were regarded as achievers by the trust school staff. I was interested in how they saw themselves in relation to the school community and what they expected to gain from schooling.

The third set of interviewees comprised a group of principals and teachers from a range of previously disadvantaged primary schools in the Cape Town metropolitan area. These interviews provided insights into the phenomenon across a range of settings. Common concerns among teachers and principals emerged, suggesting the need for further investigation.

Interviewees included learners, teachers and principals. The first interviews were conducted in the environment where the phenomenon was most strongly evident, namely, Grade 8 in a rural township secondary school where more than 50% of learners were more than three years older than the norm. These interviews elicited issues and themes significant to learning conditions for specifically older learners. Because this inquiry was seen at the time to be contingent with a learner-progression study focusing on Grade 8 older learners in previously disadvantaged schools (Jacklin, Hoadley and Guzula in Taylor and Vinjevold 1999) Grade 8 teachers were chosen for the initial interviews.

Four learners were interviewed at a rural trust school where they were currently enrolled. Two learners who had been at the trust school and had moved on to other sites were interviewed because the trust school staff considered them to be achievers. I judged it appropriate to interview them to try to find factors that might account for their relative success. The learners who were interviewed at the rural school represented three categories: perceived under-achievers, a learner making progress and two perceived achievers. These three categories provided points of comparison with each other.

Three teachers (one of Grade 4 and two of Grade 7) and four principals were interviewed at township schools in previously disadvantaged communities in greater Cape Town.

### *3.5 Methods of data collection*

Data was recorded on audiotape in loosely structured interviews that were conducted on school premises. Interviews with teachers and principals generally began with the question *Do you see any difference between normal-age learners and learners more than three years*

*older than them in the classroom?* This open question was meant to elicit their constructions of older learners and to gain a sense of what teachers thought the most obvious and significant issues were. Thereafter questions were generated by responding to the data the interviewees were providing. Some prompts were generally used (see Appendix 2), for example, teachers were asked about gender differences and attitudes to homework and principals were asked whether any specific aspects of policy caused problems in the management of older learners in the school. Care was taken, as far as possible, to avoid determining the nature of the data by restricting the interviewees to too narrow a set of questions, and to being alert to common concerns among principals.

Interviews with learners concentrated on eliciting biographical information and their assessment of epistemological issues that would enable me to assess the nature of their self-concepts in relation to the issue of agency, a theme that emerged in the teachers' discourse. A summary of each learner's biographical information is included in the report both to illustrate the localised validity of statements about the socio-economic problems experienced by older learners mentioned in the literature review, and to provide a context for the interviewees' voices. My own epistemological shift from a position that affirmed system over subject to one that saw subject as battling against arbitrary<sup>4</sup> positioning by the system also dictated that biographies be acknowledged and affirmed. These biographical accounts appear under *Learner Profiles and summary of interviews* in Chapter 4.

I started the inquiry by interviewing Grade 8 teachers and older learners in small-town and rural environments where the phenomenon is strongly manifest and where the school is the predominant point of reference in the subjects' social relations outside the home. This was to avoid misconstruing a learner's experience of engagement because in a complex metropolitan environment the school might not provide the most significant learning opportunities beyond the home for the subject. Rural or semi-rural subjects seemed more likely than urban ones to provide clear clues to some of the elements of learning conditions that mediate or obstruct learners' agentic responses to the school environment.

### *3.6 Process of data analysis*

I transcribed the interviews and used extracts verbatim to avoid any distortion of the subjects' voices. Some of the learner interviews were conducted in the second language of the researcher and the learners, namely Afrikaans, because they were unable to communicate in

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<sup>4</sup> in the sense of *despotic* (Chambers dictionary); cloaked and therefore *misrecognised* despotic power (Muller & Taylor: 1995: 262)

their first languages, namely English and Xhosa. Where translations from Afrikaans occurred, I opted for English versions that retained the expressive value of the word in preference to its denotative accuracy. For example, the word 'swaar' is translated as 'heavy' rather than as its contextual denotation, 'difficult', because the word used by the subject – *swaar* rather than *moeilik* – has a metaphoric resonance that gives the listener an insight into the learner's affective experience of learning to read (see Chapter 4: below).

I undertook a thematic analysis of the interview data using the techniques of grounded theory. In doing so, I took account of the following principles:

- theory is built inductively from data
- micro-level events are seen as the foundation for macro-level explanation
- it seeks theory that is comparable with the evidence
- it pursues generalizations by making comparisons across social situations.

Neuman (1997: 335) proposes that there are three steps in qualitative interpretation of a phenomenon:

- *first-order interpretation*: the people being studied offer reasons or motives (that is, generate data) for their experience
- *second-order interpretation*: the researcher reconstructs the subject's reported experience in order to discover underlying coherence in the data by contextualising it and trying to understand what the significance of the experience is for the subjects being studied
- *third-order interpretation*: the researcher links the second-order theory to general theory by assigning general theoretical significance to it.

Having captured first-order interpretation in transcripts of the subjects' discourse, I began by examining the discourse of the first set of interviewees (July 1998) - the grade 8 teachers - for themes that recurred in the interviews.

I then used these themes as categories for sorting data from the learner interviews (conducted July 1998).

By the time I conducted the third set of interviews, which included teachers and principals in greater Cape Town (March-April 1999), I had become aware of structural dimensions of the context through analysing policy and popular discourse. I was able to see a match emerging between my conclusions based on a search for common themes and theory suggested by

Fairclough's framework for discourse analysis and Bernstein's taxonomy of learners' rights and conditions. These texts alerted me to aspects of the distribution of power in education discourse that were affecting the ability of older learners to participate effectively in schooling.

While I do not claim to have explored the above-mentioned elements of grounded theory and interpretation exhaustively in my analysis, I believe that they resonate in the document as a whole. The processes of data collection, analysis and reading of theory have been interactive in the way suggested by Giddens (1993: 679) so that meanings derived from applying these strategies are to be found in the texture of the document rather than in neatly divisible structural components. The predisposition to produce and value texture rather than strict classification is probably an effect of my disciplinary history.

### 3.7 Validity

The multi-method, multi-disciplinary nature of qualitative research produces two crises pertinent to evaluation of a project: a crisis of representation and a crisis of legitimation (Denzin & Lincoln 1998: 19-21).

#### 3.7.1 Crisis of representation

The crisis of representation arises from an acknowledgement that social reality is not out there to be captured, but versions of it are created in the text of the researcher. The research relationship between the researcher and the 'Other' (subject of the research) nuances data in significant ways by granting the researcher a position of authority (Denzin and Lincoln vol. 1 1998: 20) in writing the text, and by creating opportunities for the subject to offer selective versions of life experience to the researcher, none of which necessarily reflect definitive descriptions of the phenomenon or answers to the research question. By drawing from a number of perspectives, kinds of sources, methodologies and inter-textual analyses the researcher speaks from *within a distinct interpretive community, which configures, in its special way, the multicultural, gendered components of the research act* (Denzin and Lincoln vol. 1: 23). The logical inference from this view of the researcher is therefore that the researcher inducts the reader into a particular site of discourse in which the reader engages critically with the phenomenon in terms of his / her own interpretive biography. Meaning becomes an intertextual negotiation in which power and ideology (Layder 1993: 51-52) can play a role.

*Any gaze is always filtered through the lenses of language, gender, social class, race and ethnicity. There are no objective observations, only*

*observations socially situated in the worlds of the observer and the observed. Subjects, or individuals, are seldom able to give full explanations of their actions or intentions; all they can offer are accounts, or stories, about what they did and why. No single method can grasp the subtle variations in ongoing human experience. As a consequence, as argued above, qualitative researchers deploy a wide range of interconnected interpretive methods, always seeking better ways to make more understandable the worlds of experience that have been studied (Denzin & Lincoln 1998 vol 1: 25).*

I have attempted to address this by assembling a variety of genres of texts that offer perspectives on the phenomenon of older learners. Within genres, I have been flexible in the use of analytic techniques such as comparison and categorisation to avoid 'blinkering' (Layder 1993: 52) and have cited theory to support findings emerging from the data, rather than selecting data to prove theory. In this I have been influenced by the practices of discourse analysis.

### 3.7.2 Crisis of legitimisation

Janesick (1998) proposes that

*validity in qualitative research has to do with description and explanation, and whether or not a given explanation fits a given description (in Denzin & Lincoln 1998 vol 2: 50).*

Citing Wolcott (1990), she refutes the applicability of quantitatively derived notions of validity, generalisability and reliability to qualitative projects because the belief that there is no 'correct' interpretation is inherent in the epistemology of qualitative research. Validity derives from the epistemological rules of the text, in other words,

*Every text must be taken on its own terms (Denzin & Lincoln 1998 vol 1: 415).*

Triangulation is often relied upon by qualitative researchers to produce validity, but Janesick (op cit: 46) sees it as *a heuristic tool for the researcher*, used to enrich the quality and depth of the description. To Denzin's (1978 in Denzin & Lincoln 1998 vol 2: 46) four types of triangulation – data, investigator, theory and methodological – she adds *interdisciplinary*. According to my understanding of triangulation, the number 'three' is not to be taken literally: the term indicates the need for variety of approaches, sources, research methods and analytic tools. Triangulation understood in this way does not simplify the search for validity, but instead increases the range of interpretive communities that may or may not find validity in the text in terms of their disciplinary histories. A disadvantage of the paradigm is that

validity stripped of external claims to authority, becomes a matter of values and politics (Denzin & Lincoln 1998 vol 1: 415).

Lincoln and Denzin (Denzin & Lincoln vol. 1: 416-417) describe a second solution to the evaluation of qualitative research: *verisimilitude* (appearance of truth). However, verisimilitude is always challengeable by subsequent researchers from different genres, claims to authority, and points of view from which they assess how grounded the verisimilitude of the text is in reality:

*Challenges to verisimilitude in qualitative research rest on the simple observation that a text is always a site of political struggle over the real and its meanings. Truth is political, and verisimilitude is textual* (Denzin & Lincoln 1998: 417).

The problem of how to establish the 'legitimacy' of a qualitative text seems intractable once one moves away from a belief in the discrete domains of the researcher as objective onlooker, an intellectual tourist in the knowable world of the researched Other, and of subjects as transmitters of assayable pieces of information about their world that complete the mystery tour. In discourse, the initiator of an exploration sets up the terms of the engagement, so that any discussion per se is legitimate, but perhaps can be evaluated as useful on the grounds of its accessibility and the moral value of its impact on the lives of the subjects.

These criteria, namely, communicative accessibility and morality, are not unproblematic. In the first instance, strangers to the discursive biographies and histories of researchers may be alienated by unfamiliar language practices, and secondly, ideology easily influences assessment of moral value.

I have found guidance in the following propositions:

- *A good text exposes how race, class and gender work their ways in the concrete lives of interacting individuals. Lather (1986, p.67) calls this catalytic [my emphasis] validity, the degree to which a given research project empowers and emancipates a research community.* (Denzin & Lincoln 1998:415-416).
- *And so we cobble. We cobble together stories that we may tell each other, some to share our profoundest links with those whom we have studied; some to help us see how we can right a wrong or relieve oppression; some to help us and others to understand how and why we did what we did, and how it all went very wrong; and some simply to sing of difference.* (Denzin & Lincoln 1998 vol. 1: 426).

The following questions reflect my current understanding of the above propositions as assessment criteria by which I would like this project to be evaluated:

- Does the project enrich the discursive field by suggesting the possibility of contingent, emancipatory sites of discourse?
- Does the researcher demonstrate a healing intention towards the lives of the subjects?

Because the data in this project consists mainly of insider perspectives reported by the subjects, the perspective in this text is unlikely to be replicable but may be contingent with the experience of other researchers. Such contingency may indicate some significance to research of issues that affect the lives of subjects similarly positioned. The discovery of similar significant constraints operating in the lives of learners in other settings might contribute towards their eventual emancipation. I hope that my project can be seen as having catalytic validity as explained by Denzin and Lincoln (1998 vol 1:426).

### *3.8 Ethics and confidentiality*

The understanding of validity outlined in the previous paragraphs raises the question of ethics both in the research and in the evaluation relationships. The researcher's ethical dilemma is pertinent to discussion of the crisis of representation, and the evaluator's to the discussion of the crisis of legitimation.

The first concern of the researcher should be that the voice of the subject is authentic in the text (Denzin & Lincoln 1998 vol 1:412). An ethical researcher would be self-reflexive, constantly questioning whether the voice of the subject in the particular site of discourse mapped by the research project, was being distorted by the power inherent in the research relationship to validate the researcher's preconceived construction of reality, and monitoring her own shifts of perspective.

The qualitative researcher is aware of the tension, inherent in intertextual collaborative construction of meaning, between representing the subject's voice – which also carries an interpretation of the phenomenon – and her own interpretation; of the undesirability of use of deception in data gathering (Punch in Denzin & Lincoln 1998 vol 1: 170); of the need to obtain the informed consent of subjects to participate in the research (op cit); and of the importance of declaring his / her points of departure and fundamental beliefs, as far as s/he is consciously aware of them (Janesick in Denzin & Lincoln 1998 vol 2: 40).



Secondly, the researcher is required to avoid harm to the subject and to respect the subject's right to confidentiality by protecting against identification by name or specific details that would unambiguously expose the subject, with consequent vulnerability to intimidation or loss of dignity (Punch in Denzin & Lincoln 1998 vol 1: 175; Stake in Denzin & Lincoln 1998 vol 2: 103).

Participation by interviewees was entirely voluntary, negotiated verbally in an informal atmosphere and the purpose of the inquiry was explained to them to the best of my ability. Interviews were conducted on the campuses of the participants so that they would feel comfortable in their own surroundings. No deception was used at any stage. I wrote to thank all the participants after the interviews were completed. Identities of interviewees remain confidential in the text of the report. Where critique of statements by major stakeholders in the management of the phenomenon appear, it is levelled at statements published or given freely on public platforms. There has been no breach of confidentiality. These measures were taken to maintain an ethical stance described above.

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## 4. PRESENTATION AND ANALYSIS OF DATA

### 4.1 Introduction

In this chapter, the presentation, analysis and discussion of the data are integrated. I have used themes that emerged from teachers' constructions of learners' identities as headings to categorise elements of the discussion as far as possible. These headings have also been used to structure the information that I subsequently gathered from learners' autobiographical accounts.

### 4.2 Teachers' constructions of learner identities

My first concern was to establish whether the teachers perceived any differences in age- 'normal' and older learners between their performances and attitudes to work, and their social relations in the classroom.

All the teachers reported that the older learners struggled academically, the major problem being unwillingness or inability to participate in the class's routine.

*X: They got a problem-- they can't concentrate...they are not active...they don't respond.*

*Y: The students which are older than they should be at Std 6 level ....they are not coping well...*

*Z: The younger ones - of fourteen years old - they are fresh you know, they are active, they are participating ...and you find the older ones they are dull - they don't respond to many things really.*

Teachers X and Z appeared to ascribe older learners' difficulties mainly to passivity, which suggests that the older learners found the classroom situation alienating.

During the course of the interviews three themes that can be seen as significant at all levels of the education system recurred in the teachers' descriptions of older learners, classifiable under **identity**, **agency** and **exclusion-anxiety** (or **inclusion**). During the interviews these issues emerged in discussions that revealed the positioning of older learners in the routines of classroom discourse. Later I used these themes to sort data from the learners' profiles. Because exclusion-anxiety is the mirror image of inclusion I have used the positive classifier, namely inclusion, in the interests of clarity and continuity later in the discussion.

Two further headings, **social behaviour** and **teaching styles and materials** highlight practical situational issues. Social behaviour however, cannot be entirely isolated as a category because all the underlying themes are manifested in social behaviour.

#### 4.2.1 Identity

Inappropriate social behaviour due to learners' difficulty with identifying with younger learners appeared to be a major common concern in the teachers' descriptions, for teachers X and Y particularly in connection with events in the males' lives.

*X: They can be bossy, and especial [sic] the other one that is going to the initiation school. So you find that now all the students they tend just really to be bossy....but I do share that he is more reserved in the classroom, very quiet, and seeing that I should think maybe that he is having that status that he is a bhuti or whatever the case...*

*Y: Most of the time they don't like jokes...they don't like jokes and they like to do jokes to the others but when the jokes come to them then they don't enjoy that....I for one always try to tell them that at least at school although you are older and the others are not older than others we have to try at least to be in the same level.... I see that from others that is the only thing that made them to drop school because they don't feel that they are supposed to be here because they are old.*

When asked whether she thought the males' difficulties were due to lack of ability or lack of interest Y was of the opinion that

*It's because of their manhood. That's the only thing because they have that pride at being a man because most of them they're already men as in our culture we have men and boys, so they...don't have such a respect for women - that's the thing, yes. They want to be respected as men. Their most interest is in their manhood, unlike their education.*

However, when teacher Z was asked whether she thought that there were any life events that made older learners more or less inclined to socialise with younger ones in the classroom, she was unsure. She ascribed the older learners' sensitivity to status to events in the classroom rather than to the influence of cultural practices outside of school.<sup>5</sup>

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<sup>5</sup> The difference between the interpretations of teachers Y and Z could possibly be ascribed to differences in the relational aspect of their discourse vis a vis the researcher. Teacher Y found it necessary to refer to 'our culture', which suggests an 'othering' by her of the researcher, while teacher X assumed a position of professional commonality between the researcher and herself in her discourse. The term 'culture' was used by three of the interviewees to explain insider perspectives to the outsider (the researcher).

*Z: The older one get maybe lesser marks than the younger one and you see that he is not good, the older ones are not feeling good for that you know ... And because the younger ones are naughty at times, because ... they are going to make jokes, you know -*

While the males distinguished between men and boys among themselves, sharing territory and participation in sport according to age and initiation experience, the females seemed anxious to reduce their visibility in the classroom. Sometimes this would take the form of trying to modify the milieu to make it easier to blend in.<sup>6</sup> Teacher Z reported that there were older female students who tried to influence younger learners to neglect their homework. When asked why she thought they did this, Z surmised

*It is just that maybe it's the frustration. It's just natural. If they've got that there are people who are negative they are not motivated so if you are frustrated then you find that you need someone to share what you are having.*

Perceptions of three different responses to pressure on the status aspect of the learners' own constructions of their identities are evident in the above accounts:

- appeals to sources of affirmation outside the classroom by referencing identity to status conferred by rites of passage rituals;
- negative self-referencing in terms of comparative ages in the class;
- anxiety about performance with reference to other learners in the classroom.

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<sup>6</sup> Cobb (1995:374-375) reports research suggesting that females are likely to seek to resolve the issue of identity through intimacy. The following statements may provide a useful gloss when considering teachers' perceptions of gender differences:

*David Bakan (1966) distinguished two aspects of mature functioning. **Agency** captures qualities of assertiveness, mastery, and distinctiveness, and **communion** reflects qualities of cooperation and union. Bakan considers these two facets of personal functioning to be balanced in the mature person. Developmentalists have traditionally translated these aspects of maturity into a developmental progression moving from communion to agency, thereby assigning greater maturity to agency. An alternative interpretation of Bakan's view of maturity, but one that equally distorts it, has assigned agency to the masculine personality and communion to the feminine. This approach easily reduces to the first because development in females often falls short of that in males when comparisons use measures that have been standardised with males (e.g., Kohlberg's measure of moral development, the use of rules in games). Most western cultures implicitly confirm either of these translations through the greater value they place on agentic over communal behaviours. Our [American] society, for example, defines success in terms of individual accomplishment and achievements rather than the quality of a person's relationships.*

*But is development most accurately thought of as increasing separation and individuation? Ruthellen Josselson (1988) notes that recent research in two areas within psychology – adolescent development and the psychology of women – reveals difficulties in viewing development this way.*

The common denominator among these three responses observed by the teachers is anxiety about what the learners consider appropriate recognition of identity in the pedagogic environment. Anxiety about whether their identities are acknowledged could have an impact on learners' self esteem. Self esteem would also be affected by learners' perception of the teachers' estimation of their cognitive competence. Implicit in at least **two** of Feuerstein's criteria for successful mediation (Feuerstein:1980) is an acknowledgement that self-esteem is crucial to epistemic sensitivity and by extension, to cognition: *shared participation* and *feeling of competence*. Ideally, in both these criteria the identity of the learner is constructed as that of an equal partner in the pedagogic relationship, with rights of access to its processes of definition and regulation, and an expectation that the learners is capable of success. 'Equal' means that the learner experiences inclusion in the pedagogic relationship as being unconditional, and that conditions will allow the learners to eventually experience success. Anxiety about the legitimacy of the self's identity in the learning environment would undermine the experience of unconditional inclusion.

#### 4.2.2 Agency

Philosophically, curriculum developers at this point in South Africa's history would probably agree that the purposes of the new curriculum would be firstly, consciously and deliberately to make possible a realisation of the good life for everyone in society, and secondly, the emancipation of the learning subject from arbitrary and discriminatory positioning so that self-directed lifelong learning becomes a possibility. These are the goals that would represent redress in educational terms. The second of these goals implies that a key indicator of likely success for learners would be whether there were signs of voluntaristic engagement (agency) in learning processes.

Homework was the issue that most starkly revealed differences between age-normal and older learners in degrees of voluntaristic (agentic) engagement with the syllabus in the Grade 8-teacher interviews. According to all three teachers, older learners avoided doing homework and were unwilling to study on their own. Each teacher could recount circumstances that made studying at home difficult for the learners: overcrowding, concern about using electricity at night, domestic responsibilities. However, teacher Z saw the problem as actually rooted in the learners' attitudes:

*...the younger ones, what they will do if you give them homework during the second period, maybe nine o'clock in the morning, and you are going to see them tomorrow, what they are going to do, just before school is out, they*

*will come with the homework done, 'Here's my homework done Mistress!' And the older ones will come tomorrow, 'Ah Miss, ah - I just forgot my book, I did it at home but my book is not with me.' And you have to respond to that... They like to behave like that in part of the homework.*

The teachers reported that both males and females tried to bully the younger learners into handing over their work so that it could be copied. Although the teachers' accounts were highly anecdotal, in their stories one could discern a pattern of a lack of voluntarism in the older learners' engagement with the routine of the syllabus, combined with efforts to use status conferred by age to avoid commitment to tasks imposed by the teacher. The teachers believed that the older learners were capable of doing the tasks, but resistant to their imposition.

*Y: ...I used to give them ten sums and now I've reduced the sums from ten to five. Sometimes I'm giving them only three. To see whether they cope or not ...where I've seen that if we had given them one sum for a homework they don't do it at all...the more work you give them they do it but they don't do it out of their own. They treat it in such a manner. They do it from others. They take other kids' work.*

Teacher Y had tried to assert control over the older learners' engagement by reducing the amount of work required. Teacher Z tried to motivate them by spurring them on to compete with the others in the class by working harder:

*...the aim of me as a teacher is to try to motivate them: 'See that the other one is reading his books, and you must push yourself - don't get ten out of fifty - you must try to catch him, at least those forties, you know'. I thought it was a motivation but by saying that ...they were getting angry, you know, some of them. Then I said no, let me cut this out.*

The strategies were opposite in nature but met with a similar response, namely, non-cooperation. One concludes that the resistance was to perceived manipulation by the teacher, which indicates the learner's desire for autonomy that is a characteristic of adolescent development. Adolescents' need to exercise autonomy could contribute powerfully to the development of agency if conditions provided opportunities for learners to take the initiative by making choices in the learning process.

Teacher Z recounted an incident when she had broken with routine to try a different style of teaching based on a crossword puzzle that the class solved together on the blackboard. This had elicited the enthusiastic participation of a normally apathetic older learner who realised that he knew one of the clues to the puzzle and literally leapt at the chance to put it down.

*And he said, 'No - the answer that he [sic] knew is only number 7 so that's why I jumped it so that you don't go and write this word that I know, because I know that you are going to know all the other answers and I'll be the one whose not maybe going to write on the board so that is why I jumped'. And the others laughed and laughed and laughed.*

Social relations in the class had suddenly brightened and Z felt optimistic about the learner's ability to make progress.

*Really, he was interested. It was interesting for all of them anyway. So I saw that and I observed that he like things that are - he is very playful.....if there is that freelancing in the class you know - they are free, they are shouting at each other but learning something on the board - see he can, he could catch up things you know....*

*I think for - although he is old the attachment between him and the younger kids is - um - good when it comes to, you know, playing. It is good. But when it comes to serious things then I think he get that complex that I'm older than these younger kids.*

Unlike in the response to Z's unsuccessful attempts to motivate by encouraging competition, in this incident it appears that the threat of being overwhelmed by the competition actually had an enabling effect on the learner. The inclusive style of the lesson - a game - provided a structured opportunity for the learner to act agentially, choosing the moment of participation according to his recognition of his own prior knowledge. All the learners responded to the humour in the ironies in interplay of 'usual' statuses, and the social dynamics precipitated a learning moment in which the older learner was actually able to explain and justify his process: a moment of victory for metacognition.

Another of Z's anecdotes was about a 'playful' learner who tended to disrupt the class by  
*trying to make jokes, that they can laugh...*

however,

*Now so this kid I found out that whenever he is writing at least he is average, not bad, not good - he is average...ja, because we are expecting as teachers ... because he is braveful and all that, we thought ... that he doesn't listen you know. But you find that he beat the others that they concentrated, in writing. So I don't know what kind of a problem is that.*

Z's interpretation of what may have accounted for the learner's apparent voluntary epistemic engagement in writing suggests that it provided an opportunity to express himself:

*...I used to say there are good people in writing and there are good people in listening - you find that I'm weaker, I don't listen very well but when it comes I should write what is inside me I write it . you know.*

Unlike in the solving of the sums or the chasing of apparently arbitrary norm-referenced grades that characterised the previously cited attempts to engage the learners, in this expressive writing task the learner could conceivably exercise more control over its process and outcome because his own resources constituted the material input of the task. As in the crossword puzzle incident, agency would combine with prior knowledge to effect engagement.

#### 4.2.3 Inclusion

When I started my investigation I had considered relevancy of materials to be the most pressing issue affecting engagement in learning for the older learners. This assumption was derived from my own commonsense about the universality of age-grade consonance. Teacher Y, however, did not construe this issue as a problem:

*Do they get interested in the materials at any stage in the classroom - is it [i.e. lack of interest in their education] just a social thing or do you think they are just not interested in the kinds of learning materials?*

*No, they are interested a lot in the kind of material - the learning material  
Are they?*

*They are interested, in such a way that they don't have that manhood when we are in the class when we are sharing the material - we don't have such a problem when we just share the material with the others.*

Y's remarks revealed that the sharing of materials provided an inclusionary context in which it was safe for the older learner to suspend anxiety over status. However, the mismatch between older and younger learners' levels of social experience reflected in the materials would probably not be as grotesque in grade 8 as in primary grades.

Teacher X's observations about how older learners responded to requests from the bureaucracy for personal details supports the interpretation that a sense of social inclusion is possibly more significant for the learner than the level of the learning materials:

*... even if maybe we are doing annual returns you ask them how old are you, sixteen years, those thirteen years whatever, they say [hands] held high - the older ones you find they are very shy*

*They don't want to say what age they are?*

*Ja. Even when they say twenty-one they are shy. They are very much shy.*



This exchange suggests by inference that status conferred by passage to 'manhood' through initiation, or status claimed by virtue of age, is used by learners as a strategy to overcome a sense of exclusion induced in a particular moment of interaction when their positioning in orders of discourse becomes apparent to them, rather than as a permanent claim for special treatment. It is significant that this loss of confidence emerges when the learners are faced with the demands of an invisible bureaucracy that represents an abstract System. The learners are sensitive to institutional power exerting pressure on psychosocial relations in the classroom.

An early assumption of mine was that socio-economic problems that led to learners being 'over-age' also accounted for their lack of progress in school. Indeed, at a social level, all the problems mentioned by Wenman as problems in the lives of older learners were present in the teachers' anecdotal accounts of the learners' off-campus lives (referred to in brackets):

- migrancy (leading to school-hopping);
- economic stress (having to save electricity);
- urbanisation (drinking in the tavern - 'London Town'! - and overcrowded living conditions);
- domestic division of labour (especially for females);
- violence (particularly rape).

Only malnutrition was not specifically mentioned, but neglect due to learners boarding with uninterested relatives and parental work routines that prevented communication with their children were described. However, these problems were not unique to older learners and so would not account for the specific differences between older and younger learners described by the teachers. Reasons for specific differences between younger and older learners' performance were more likely to be found in the social positioning of learners in the classroom, a site where conditions were constructed to privilege particular identities and marginalise or exclude others who did not conform to the profiles that classroom practice tended to privilege, resulting in apathy among those learners who felt alienated.

At a situational level, the teachers reported that grudging attendance at school was particularly significant among the older learners:

*...because the other thing that makes them to be so down, actually not coping, is that they don't attend school properly...once the parents are already left [for work] they just sit and don't come to work and that's the most important thing.*

***Do you have a big absentee problem with the older ones?***

*A lot. A lot. Especially the older ones. The older ones, yes....they don't want to attend school.... it's supposed to be the ones that are more interested because their ages are high but to my surprise they are the ones that don't want to attend school properly now.*

This suggests that poor attendance was a response to something in the system specific to older learners.

The most obvious difference between age-normal and older learners from a systemic perspective was the construction of the older learners' identities as aberrant. Because the 'aberrant' learner would experience a sense of distance, exclusion, from what is perceived as the mainstream in the class one can conclude that it is probably this sense of exclusion that dulls commitment and sensitivity to engagement in learning by older learners.

It is possible furthermore, that the desire to assume autonomy in adolescence would exacerbate the older learner's reluctance to submit to coercion to attend school, especially when the school environment was experienced as alienating.

#### 4.2.4 Social behaviour

The teachers whom I interviewed in Nyanga, Khayelitsha and Philippi in greater Cape Town did not ascribe older learners' difficulties to the fact that they were cognitively deficient but to their efforts to position themselves socially.

***Do you find that they're behind the others? Do they learn more slowly than the others?***

*Not all of them. Because those older learners are actually here for various reasons. Some of them have difficult problems - they didn't do it because they aren't as good as the others but some really have difficulty in the school.*

***What sort of problems do they give you?***

*The problem is that they're not paying attention - they become bullies and they like playing, something like that, then they're teasing others - then they are out of control.*

All the teachers, who taught in different schools, mentioned instances of bullying - corroborating the opinions of the small town Grade 8 teachers - but conceded that this behaviour was not inevitable. All of them reported that giving older learners as a group extra-curricular tasks to do had positive effects on attitudes, promoting prosocial behaviour.

*Teacher 1: They become very responsible if you give them a task. Active, especially they would pursue the task and they don't want their group to be seen as a failure, so they try.*

*Teacher 2: What I usually do is I always give them the most responsibility in the class. Like making bell, monitor, or senior counsellors or anything, just to make them responsible. And somehow it helps, because as the year goes on the young ones tend to respect them.....because of that, I mean the attitude changes gradually.*

*There is one girl who is very responsible in the selling of stuff - whether it's funds, we sell chips, and then if the selling is done by her you will see those monies will be just there. If one of the younger ones sell you will hear different stories: 'I forgot to bring the money; I lost the money - but if it's her who's selling that week then you'll see everything will be just there.*

*Sometimes we have this complaint about soiled toilets, and I'll be calling and calling meetings, speaking to them, but one [older learner] came to me and said 'Just leave it to us Ma'am - we will see what we can do'. And if you go to the girls' toilets now you'll see there are notices written there: 'Don't do this, this and that, do this, do this, do this', and it seems to work.*

*Teacher 3: ...If you motivate them, giving them tasks to do, so that he feels important in the classroom - like we've got a library corner here, so two of them - I change them monthly - two becomes responsible for the library and one is a bell ringer...*

*Are those the boys or the girls?*

*Those are the girls...So you give them your watch, so that they can check the time...they're responsible, put it back in my cupboard, very clean, very neat - so they enjoy that if you give them tasks. It shows one of the motivations by the teacher.*

*And they do this quite willingly?*

*Yes, even the cleaning - they like it - even the boys do the cleaning.*

It is interesting to note that in the trust school, where older learners were not singled out and given non-academic tasks by their teacher, they actually expressed a desire to do them. This is a contentious issue, illustrated by the remark at a workshop on street children (Educational Support Services Trust, April 1999) by a representative from POLP that teachers 'used' older learners to perform errands and chores. This practice was negatively construed in the presentation, although she made the point that older learners felt anonymous in the school and that the construction of their identities by teachers was crucially important to success. The representative's interpretation of the teachers' practice differed from their own construction of what they were doing. While the teachers saw the tasks as enhancing the learners' profiles in the community, the representative saw the practice as the teachers' exercise of exploitative power over the learners. It appeared to me that teachers believed that in asking older learners to perform tasks that younger learners were not required to do, they were promoting pro-social behaviour and self-esteem in older learners.

#### 4.2.5 Teaching styles and materials

It may be significant that when standardised tests and exercises were used, relations between older and younger learners became problematic.

*Z: The older ones get maybe lesser marks than the younger ones and you see that he is not good, the older ones are not feeling good for that you know.....And because the younger ones are naughty at times, because.....they are going to make jokes, you know –*

Standardisation appeared to exacerbate divisions in the class, whereas games (see pg 66 above) seemed to promote willing participation by an older learner. When Teacher Y's remarks are considered in the light of Z's statement above, it appears that it is not the materials themselves that cause older learners to feel alienated in the learning environment, but the application of standardised assessment.

*....do you think they are just not interested in the materials?*

*No, they are interested a lot in the materials – the learning material.*

Older learners, it seems, are willing to take risks in an environment, such as a game, that is free of the danger of being formally labelled as belonging in an incompetent category, which is the effect of standardised assessment.

Teachers were divided on whether grouping of older learners in a class was beneficial or not. A Grade 7 teacher in Khayalitsha noted that grouping of older learners had been positive in one class and not in the other in the same school and grade.

*In 5A all the boys sit in a group and they are quite nice compared to the other class [5B] and that other class even had to paint [it] because they are quite naughty.*

*What sorts of things make them work well?*

*They become very responsible if you give them a task. Active, especially they would pursue the task and they don't want their group to be seen as a failure so they try.*

Asked whether he thought that special arrangements should be made to separate older and younger learners in the intermediate phase, the same teacher suggested that competition between age groups seemed useful.

*I don't really think those kids need to have their own classes because where they are mixed with other age groups it does give them competition – to me it's like they don't feel the disgrace of being the eldest in the school.....most kids, you find that the young ones are more competitive generally speaking compared to the older students. What I'm saying is that if they have their own class it's not going to give them competition that much.*

A Grade 4 teacher in Philippi had used group work in her class and had experienced problems related to a sense of competition among learners. However, the competition did not appear to be related to rivalry between age groups but was more probably performance-based.

*All that they need are the marks. 'How much do I get?' – you see? So they are very keen. Even if you gave them in a group, they will indicate that this one didn't participate, you see – so they don't want their mark to be equal with the others who don't participate. To give a mark as a group – it's problematic.*

***If they don't get as much as the younger learners, how do they react?***

*I used to give them time – I do it for the first time, and I see he is not doing well, then I give them another chance, especially in reading.....I don't just give them the mark today, you see? I give them a chance.*

***So they are happy to have it like that and not keep ahead of the younger ones all the time –***

*They feel sometimes if they maybe get a lower mark – I used to do the competition with the group marks – so they combined their marks and see how many marks they could form –*

***like a team –***

*ja, as a team, so if the team gets a low mark, and it's because of him he feels very much embarrassed. You see? – and if others do, the younger ones, get a low mark – oo – it become [sic] a problem to them. 'Why are you doing this?'*

***Do the children ever become ware that age is an issue?***

*No. They're happy and I don't think that's a good thing to tell them that 'if you are in this class you should be that class according to your age'. I think that's not good for the child because he will feel very much demotivated because 'I'm not part of this class', you see? But if we keep them equal, everything is fine for them*

***So you wouldn't agree then if the department said you're not allowed to take these older children?***

*No – because I don't have problems.*

A Grade 7 teacher from Philippi noted that her older learners responded well to the opportunity to earn merit badges.

*...this year I started some kind of a competition and I said whoever does this, after achieving so many credits, will get a merit or something.....and now I can see the interest, things are starting to change a little. they are starting to get so interested now and last week I was so interested because two of them...came to me before the end of the day and they say 'Ma'am we would like to come to you after school because we want you to explain this, this and this and that to us and I was so shocked but I was so happy at the same time. And I mean they really came to me and before the bell rang, two minutes before the bell rang one came to me and said 'Miss you mustn't forget' and I said 'No – no.'*

Unlike the previously cited teacher however, this teacher had doubts about the desirability of having older and younger learners together, not because they had cognitive differences, but for social reasons. She wondered whether an outbreak of drinking among younger learners might be ascribed to the influence of older learners' talk about their extra-mural activities. In her opinion the cognitive problems could be solved.

*I've got no problem with them academically. Because if you explain and keep on explaining they will end up understanding.*

Two teachers, one in the Karoo township school<sup>7</sup> and the other in Philippi, reported that older learners preferred writing tasks rather than speaking activities. The teacher from Philippi (cited above) ascribed this to fear of ridicule and remarked that older learners' unwillingness to participate in certain activities affected younger learners' participation negatively. She did not think that the reading materials had a significant affect on how older learners felt about participating in class.

*What about the materials in class – are they interested in them, or do they show lack of interest?*

*Like the reading materials?*

*Yes, because some people have thought that perhaps the stories and pictures and things like show much younger learners, but is that really a problem?*

*Not with all of them – because some really show an interest in reading. There are books from READ and they are interested in reading them, any material you give them they will read. And there are some who are totally, young and old, who are totally not interested in reading.*

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<sup>7</sup> see page 67

***So it's a personal thing, it's not to do with the material?***

*It's a personal thing really. But when it comes to acting out things, they are always reluctant to – they don't want to, they don't. And sometimes they think it's quite childish to stand in front of the class and mimic something or any action. They feel it's quite childish.*

***Does this affect the way the rest of the class feel about it?***

*Yes it does, because like today I said 'I will read and then whoever comes in front here must act whatever I'm reading' and I said 'When the bird flies it opens its wings', and then I want somebody to open the wings and push the chest forward and it took me ten minutes to stand there asking for a volunteer – 'Come and act out what I am reading' – and nobody did. Until I said, 'You - come and do it'. Because I think the older ones influenced the others in a way – they are making it difficult for the young ones to do things easily.*

From these interviews I concluded that skilful and flexible management of social relations in classes was more significant in creating successful learning conditions than were logistical formulae.

#### *4.3 Learner-interviews at a farm Trust school*

In July 1998 I interviewed two categories of learners at a farm school run by a community education trust:

- Group A: four males who were seen by teachers at the school as slow learners, ranging in age from 15 to 18 in grades 2 - 5. When I requested an opportunity to interview learners disadvantaged by being 'over-age', these were the subjects referred to me. Reasons for the absence of female subjects would be worth investigating. I was not able to explore whether the choice was because the (female) teacher did not construe female older learners as problematic or whether there were in fact no older female learners in her class.
- Group B: two students (one male, one female), aged 20 in grade 10 and 19 in grade 12 respectively, who had moved to high schools in other towns and had been regarded as achievers at the farm school. I was interested in the self-concepts of these achievers.

The learners in group A had moved from other farm schools to the trust school when their schools had closed a year before the interviews. All the interviewees were mother tongue Xhosa speakers. The medium of instruction in the trust school was English. The interviews with group A were conducted in the second language of both myself and the interviewees, Afrikaans, because we did not share a common first language.

#### 4.3.1 Learner Portraits - Farm trust School

The biographical information in these profiles was constructed from the learners' own accounts of their lives.

##### 4.3.1.1 Group A - 'slow' learners

Andile was 15 years old in grade 4. An interesting aspect of the interview with Andile was that he attempted to conduct himself in English even though the interviewer put questions to him in Afrikaans, until the questions became too probing for simple information about birthplace, current address and age to suffice as answers. Analysis of the second set of interviews below ('achievers') may provide a clue to understanding this choice.

Andile lived with relatives (*My oom en my auntie*) on a farm some distance from the school (*Daar's 'n groot loop vir ons hiernatoe*). His widowed mother frequently moved domiciles between Karroo hamlets and was employed intermittently, and his only sibling, a sister, lived in a city approximately 200 kilometres from the farm. Neither of them contributed financially to his support. Andile did not know whether his mother had ever attended school (*Ek weet nie hy {sic} het geleer nie of hy het geleer nie - ek vra hom nie*). His uncle and aunt had reached standards six and seven respectively and encouraged him to attend school. When asked what he would like to do when he left school he replied that he was going to be a teacher, but could not explain why, except that his aunt had asked him about the teacher (*...hy{sic} vra vir my om sy oor die teacher*) and he believed that it was 'easy / comfortable' to be a teacher at the school (*ek glo is maklik om die teacher te wees daar by die skool*).

When asked whether there were problems at school that made it difficult for him to learn he said that he couldn't learn the 'heavy words' (*die name wat so swaar is*). The teacher helped him decipher the reading books (*Ek - ek leer, ek leer en hy {sic} gaan kom help om my om te leer. Ek leer my en ek se ek ken nie die name en dan kan hulle vir my se*). However, when asked whether there was anything he would like to do in the English class, he said he wanted to read. He found mathematics less difficult and enjoyed it.

Andile found the question 'If the principal said to you, "Andile you can change something in this school", what would you say?' (*As die hoof se vir jou, "Andile, jy kan iets in die skool verander", wat sou jy se?*) difficult to answer. When the question was rephrased in English, 'If you could change something in this school what would you change?' Andile responded, 'Like read -', but could get no further. When prompted with 'Or - if there is something you



would like to do - what would it be?...sport or drawing or singing...' he replied: 'I also sing - I can't draw - and do sport' (*'Ek sing 'ok - ek kannie teken nie - en sport doen'*).

Andile discussed schoolwork outside of class time with a classmate, Vusile, whom he thought to be thirteen or fourteen years old (*Ek se vir hom soveel en hy se nee ek dink dis so en so*). Andile and Vusile were part of a group of five older learners in the class who played ball games and talked together during break times but were not allowed to sit with each other in the class because they were noisy (*Sy {onderwyseres} se ons maak noise in die klas*). When asked whether he thought it would be better if they sat together or apart in class Andile was quick to respond, 'We are better when we sit together' (*Ons is beter as ons mekaar sit*). He was quite emphatic about this:

- |  |                              |
|--|------------------------------|
| Interviewer: Beter mekaar?                     | Better together?             |
| Andile: Ja.                                    | Yes.                         |
| I: Werk julle beter mekaar? Werk julle beter - | You work better together?    |
| A: In die boek?                                | In the book?                 |
| I: Ja.   | Yes.                         |
| A: Ons werk mooi                               | We work well.                |
| I: Werk mooi - mekaar?                         | Work well - together?        |
| A: Eh - ja.                                    | Eh (abbre. Xhosa 'ewe') yes. |

Andrew, a seventeen year old orphan in grade 5, started school for the first time at the trust school at the age of fifteen. He was cared for by three brothers, none of whom had attended school, and who worked on the farm where he lived. His sister, who lived 'in town' had no formal schooling but could read a little and occasionally helped him with his schoolwork. His older siblings encouraged him to attend school.

When he arrived home in the afternoon he first finished schoolwork before helping moderately (*'n kort tyd*) with farm work. He did not discuss schoolwork once he had finished it and played soccer at home with his 'tjommies'. At school he played soccer and 'dikball' (a game played with a tennis ball) with a large group of adolescents both in his own class and in higher grades. He never played with younger learners.

Andrew enjoyed mathematics, science and English. He found mathematics the most difficult of the three. When asked to explain why he liked maths in spite of its difficulty he found the reason hard to pinpoint. Given a choice of prompts - 'interesting' or 'useful' - he opted for 'interesting'. He intended doing farmwork when he had finished his schooling and could not

think of what possible application mathematics could have to farmwork until the interviewer had suggested some situations such as weighing and counting. He added his own contributions to the possible application by expanding the category of things that could be weighed or counted - onions, hares - but did not expand on the operations it might facilitate.

Like Andile, Andrew found the question about hypothetical change to an aspect of school impossible to answer. After a long pause he closed the issue with 'No, I wouldn't change anything' (*Nee, ek sou niks verander nie*). He couldn't think of anyone he admired or would like to emulate. He wanted to go as far as 'standard 10' (grade 12) in school and said that this aspiration was his own idea. Thereafter he was going to work on the farm.

**Hendrik H.** eighteen years old in grade 2, lived with his parents. There were only three in the home. He wanted to go as far as grade 3 in school and then work on the farm. He did not think that schoolwork would help farmwork. When asked why he did schoolwork he replied 'To get my education' (*Om my geleerendheid te kry* or possibly 'To get education for myself'). He did not find anything more or less difficult at school but enjoyed Afrikaans because it was his language.

To relax, Hendrik played soccer at home with people generally older (*groter*) than himself and at school with his 'tjommies', other teenagers, some younger than himself but also in his class. Although separated from his 'tjommies' in class because 'otherwise the work can't go on because we just make a noise and talk' (*Anderste kan die werk nie aangaan nie gat hulle ons net geraas en gesels*), sometimes they discussed schoolwork and helped each other. This however, was incidental to playing ball games.

In response to the question of being able to change something at the school, after some hesitation, Hendrik expressed a desire to be asked to do things (*as jy my nou vra om iets te doen*) like 'vullis' (garbage) and to 'work here in the classes' (*hierso in die klasse werk*).

**Sikumbuso** aged 18 in grade 2 wanted to be interviewed in English although his use of English was weaker than Afrikaans. He lived with two siblings and his mother and father. His mother, but not his father, had attended school. They had warned him to behave well at school (*They say I must not in the school - I'm sleg. Praat in the school. I must be careful in the school*). When asked whether there was anyone at home who could help him with schoolwork he said that his mother and father helped him. He said he had started school when he was eight years old and had attended his previous school continuously until the recent transfer to Umthombo. He wanted to achieve Grade 12 and then be a teacher.

Like the other interviewees, Sikumbuso only played ball games with older learners. He and his friends talked about schoolwork, and also about an incident when all the boys in the school had been made to clean their toilets because they had been left fouled. Sikumbuso said that he liked to clean the toilets and the classroom. He concluded the interview saying that he liked to come to school and *'I like to play with the other children'*.

#### 4.3.1.2 Group B - Achievers

I interviewed two learners who had been regarded as achievers at the trust school to explore the relationship between social relations and epistemic conditions experienced by them as having been possibly conducive or obstructive to their success. Both learners had moved to other schools because the trust school only went as far as grade 9.

Margaret M., aged 19, was in grade 12 at an ex-model C (House of Assembly) high school. When asked how many people lived in the house where she boarded during term time, she said that there were three adults and two children. When asked how old the children were she explained that she and another boarder of a similar age were the 'children'. This construction was interesting because it suggested that 'child' was related to her social status as a dependant, rather than to her chronological age. A comparison can be made between Margaret's concept of status as conferred by social relations rather than biology and chronology, and the status conferred on males by initiation, also socially constructed and signifying a shift from childhood to adult autonomy. (Although initiation usually happens in late adolescence it is not strictly tied to a particular biological or chronological event during maturation.) This construction of herself did not appear to negatively affect her ability to engage at school.

Back at home on the farm Margaret lived in a household of women: aunts and cousins, including a young baby. Her aunt, who had not had any formal schooling herself, and her mother who worked far away in a coastal town, were particularly supportive: *'Always by my side'*. She knew that all the people she lived with encouraged her education, but she seldom discussed this, or other issues, with them.

*I am somebody who like (sic) to be alone. I believe to keep things for myself. But at school I talk to my friends about school, and how I enjoy, and how I believe in education.*

However, asked whether she had a lot of friends she said she believed 'there is nothing like a friend'. She liked to be alone, and enjoyed that. She believed that friends were 'people who leads (sic) you to wrong things'. The statement above indicates that she preferred to enter into social discourse on her own terms, preferring not to participate if the subject of the discourse was not under her control.

The homework issue was explored in the interview to establish a sense of how agentic Margaret felt herself to be in her engagement with school. She occasionally discussed her homework with the son of the elderly couple she boarded with. He had been a teacher and now worked for the education department. Every day after school she was required to prepare lunch for the household and clean the house, which she estimated took about an hour. She felt that these duties put pressure on her time for homework. She did not have a quiet space to do her work, so went to a library or worked on her bed. Although the school had textbooks, she used the library to gain additional information. She had a friend she liked to go to the library with to look for extra information and discuss homework together. Her teachers had encouraged this practice, saying that they shouldn't rely only on textbooks.

Margaret's education had been interrupted for a year at the age of 13 because of pregnancy. She recalled this as a very painful period of her life that still caused her to 'feel concerned'. After this event

*I told myself that ...in my life I made a commitment for myself and told myself that what I wanted in my life was education and I'm going to go for that.*

The trust school had fully supported her commitment. She wanted her child, now attending pre-school at the trust school, to get the best education 'and be a good child'.

Asked what she would do if she were the head of a school, Margaret did not hesitate to hypothesise:

*Firstly I would put rules for the children at school. Rules which they have to follow. And I'll always tell them that everybody's future depends on his or her two hands. Then it's up to everyone to take that chance and use it on (sic) the right way.*

Asked whether she felt that her progress was in her own hands she was unequivocal:

'Yes'.

From a language point of view, Margaret seemed well equipped to exercise the kind of agency she claimed was most crucial to progress. The medium of instruction at the trust

school had been English and her home language was Xhosa. She used Xhosa, not English, in conversation in the township and spoke only Afrikaans with her mother who, she said, did not speak Xhosa well because her friends in the coastal town were mostly non-Xhosa speakers. Margaret had known no English when she started at the trust school in grade 6 at age 12. At her previous farm school she had been taught mostly in Xhosa and in Afrikaans. The textbooks had been in English. She regarded the practice of mediating the material in Xhosa as a bad idea. She said it made it difficult for the students when 'they had to go outside' and discuss with other students who had been taught in English, and slowed the process of acquiring English. She recalled the years at her first school as 'the hard time of my life', not only because of language difficulties but also because of the distance she had had to walk to school. From my own observation of this school before its closure I learned that it had been one of South Africa's forgotten farm schools, desperately under-resourced and chaotically managed.

When asked what she wanted to do when she left school Margaret said that she had been interested in being a presenter on television but had decided that 'it won't be good for me', so then had decided to do social work because

*when I see students, most of kids, ... at the streets, who are helpless, and all those things, so I thought I hope I was there for them. So that I can give them my little help.*

Margaret had transferred from another high school to her present one because the person who had made her pregnant as a child reappeared on the scene. She told him that he must leave her alone

*because I want to go on with my life the way I want to with no guy in my life... so I decided to go away from [ ] to somewhere else.*

She felt happy about her decision to leave the town because she was in control of her life.

Margaret was asked whether she thought her present school was adequately managed. She said that there was a lot of discipline, which she felt made her feel that one should do one's work. Although it helped her, she would still work even if there were no sanctions. She felt that other 'naughty people' needed disciplinary measures.

Asked whether she would change anything in her present school she said there was one thing: the language medium. The school was a predominantly Afrikaans school, but she could do most of her subjects in English. Although in reality she only did one subject in Afrikaans,

Biology, she saw the language medium as her greatest problem. Her friend, the education department official, had advised her to change schools and attend the township school 'where I would get my things better' but she said she was afraid that it was too late and had decided to press on at the ex-model C school. Her response could also have been a response to a perceived threat to her autonomy or agency sensed in pressure from her friend.

Asked what had helped her to do well at school, Margaret said

*No, there's nothing more than being proud of yourself. And want good in your future. When you like to be someone good then you are going to go for that.*

*What is it in your school or home, whatever, that makes you feel good about yourself?*

*I am a person who always do things on myself. A person who's known as an intelligent person. That makes me feel proud.*

*When you're at school, what things happen that make you feel 'Yes, I'm an intelligent person'?*

*When I've been asked a question then I answer it and I got it right then I told myself yes I am...*

Asked whether she defined her own goals or aimed to fulfil the teacher's expectations Margaret explained that one should try to exceed those expectations. This had been taught to her in primary school [the trust school] and was still a guiding principle, which she realised by using the library voluntarily.

**Richard F.** was 20 years old in grade 10. The staff at the trust school had tried to find a place for him in an ex-model C school because they believed that he had the potential to attend university. None of the schools they had approached would accept him because of his age, so he enrolled at the township school in which I had conducted the pilot study.

Richard lived in the township with his grandparents during school term time. His grandfather was a Zionist priest who, although himself only having had formal education to grade 3, encouraged commitment to education not only at home but also in public in his sermons and prayers, especially at examination times. His grandparents were keen to hear all about what Richard learned at school, especially physical science. Of his parents, only his father had been to school - until grade 2. His father was determined that his children would be educated because he saw education as 'the key' to better jobs. Richard's progress through schooling had been delayed, but not interrupted, by his father's migrancy during Richard's childhood.

He had started school at 10 years old in 1988 in the township primary school where he learned in Afrikaans and Xhosa, moved to a farm school (Afrikaans and Xhosa with English textbooks) in 1990, to the trust school in 1991 where the medium of instruction was English, had to repeat grade 6 because he had to switch from English to Afrikaans when he moved to a hamlet some distance away in 1994, and returned to the trust school in 1995 where he completed grades 7, 8 and 9 in English.

At first Richard found the attitude of fellow learners at the township high school problematic - 'they are naughty' - but settled down once he had found a group of friends who he judged were serious about their work.

Richard usually did homework on his own at home and sometimes with his friends in his grandfather's 'old house'. He explained that some people were shy to speak to the teachers but it went much better for them when the group helped each other. He liked to do homework first on his own to

*'prove myself...how much I understand properly. I do it first on my own and then if I see I don't understand then together - I'll go to them to ask them or I'll go to my teachers and then I'll ask how can I do this then I'll go home and do it myself'.*

He usually did his homework in the company of his cousin in grade 12 after the rest of the family had gone to bed at night. She sometimes helped him, especially with Biology, which was also one of her subjects at school. He sometimes helped his grandfather in the garden, planting trees and flowers, which he enjoyed. His grandfather always asked him whether he had homework before requesting help, and homework was always prioritised. He belonged to a karate club where he took part in the sport at four o'clock, after homework. Richard wanted to be a mechanical engineer or doctor when he left school.

When asked what had helped him to do well at school he said that it had been his teachers at the trust school:

*they always push me behind, say 'Richard, you have to study because you can do well at school and please you to start here'.*

Asked whether it had ever been a problem at primary school that he had been older than other children he said that many of the children had been older than him, so he did not have a problem. The same thing applied in the township high school.

My concern about the relevance of available resource materials led me to ask Richard whether he had found reading material in primary school interesting. He said that he had found books that interested him in the library. He had had free access to the trust school library and he had enjoyed the reading competitions run by the READ organisation. From his response I concluded that the ability to exercise choice and participate in alternative activities that affirmed his competence had compensated for any possible lack of personal relevance in class-based materials, which he did not comment on.

Richard felt that his experience at the hamlet school had improved his Afrikaans and he felt competent to learn in it but his account of the contexts in which he preferred to use English made it clear that English had epistemological significance for him. Asked why he found English 'easy' to work in he said that when he started school he liked English very much and he liked to speak it.

*So here at [the name of the trust school] spoke English all the way so now I like English and now I can understand at least English.*

Asked whether he ever spoke English outside of school, Richard said

*Yes I can say me and my friend, last year, liked to speak English - he was my classmate here [at the trust school] - but now we are all there at [the township high school], but now he leave school; he is not attending school but we like to speak English. Even when I'm getting here on the farm I like to speak English with him.*

At the township high school Richard and his classmates generally preferred to operate in English:

*When we are in the class we like to speak English....and when we are busy here in the class we are speaking English as groups, when we are doing maybe something alone but we try to speak English we don't speak Xhosa.*

*Would you like to speak more Xhosa at school?*

*Yes, other children actually speak Xhosa but I don't like to speak Xhosa much - when we are studying I don't like to speak it.*

*Why don't you like to speak Xhosa while you are studying?*

*Because now I get something difficult because I want to understand it as the way it is put here in the book. So I like to speak English and I like to explain it in English and I like also somebody explain it in English.*

*So you don't like to have to translate from one to the other?*



*Yes and we also want to improve our English speaking.*

*Do you find it difficult to translate from one to the other?*

*I can say sometimes it's difficult but sometimes it's easy.*

*What sort of things make it difficult to translate?*

*Sometimes I get shy, I don't like to speak.*

When pressed about whether this was true of all his subjects, Richard conceded that explanations in Xhosa made things easier to understand in mathematics, but in his construction of his response to the question he distanced himself from fellow learners at the high school by generalising the benefit as belonging to the rest of the 'children' in the class:

*Our teacher, which teaches maths, he is a bit fast - but now when he explain us with Xhosa sometimes... Most of the children like something to be explained in Xhosa, so they need things in Xhosa.*

I interpreted his affective reaction (shyness) to the translation situation as feeling pressure from 'outside' on the control he liked to exercise through choosing his language medium. His construction of himself as a learner was closely linked with a sense of being able to be academically agentic in English. This experience had been supported by his teachers' construction of him at the trust school as a gifted person, in spite of his age, an anomaly that was not seen in the trust school environment as relevant to his learning.

#### 4.3.2 Interpretation of learner-interview data

These themes, previously identified in the data from teacher interviews, were also seen to be present in the discourse of learners:

- integrity of identity
- ability to exercise agency
- inclusion in the school community.

The three themes are interdependent.

Integrity of identity appeared to depend on a sense of security derived from unconditional acceptance - inclusion - into the school community. Agency developed when learners were confident that successful learning was possible for them and that they could initiate action to effect it and to enhance their sense of belonging in the school community.

The themes can be viewed against the background of Bernstein's taxonomy of conditions that make the realisation of learners' rights possible, namely, confidence that facilitates enhancement of the self; inclusion that provides the learners with a secure sense of belonging (*communitas*); and an ability to exercise voluntary power to shape participation in the learning environment.

#### 4.3.2.1 Identity

Andrew, who had started school at the trust school, left and returned, all within the previous three years, had made the most progress in the system in spite of his family's migrancy. He showed least anxiety about the acceptability of his identity. He used Afrikaans without hesitation and was comfortable answering questions frankly: *[Interviewer:] Is daar iemand by die huis met wie jy oor jou skoolwerk kan praat - of los jy net die skoolwerk en praat oor ander dinge?* *[Andrew:] Ek los my skoolwerk.* Andrew enjoyed all his school subjects, wanted to finish grade 12 but intended to stay on the farm. He seemed to assume that he could stay at the school for as long as he needed to - possibly because the school provided for adult literacy and skills training in addition to grades R (reception year) to 9 and possibly because of his own experience of 'skipping' grades. Compared with the other interviewees, he demonstrated confidence in his ability to interact with the school environment on his own terms.

In view of Sikumbuso's age (18) and academic history (Grade 2), both his self-definition as one of the 'children' and his aspiration to be a teacher would seem inappropriate in an environment structured by age norms. He seemed to be the most anxious of the four learners to be seen to conform to his perception of the school's expectations of him. He had chosen to be interviewed in English, the medium of instruction of the school but the language in which he was probably least competent on a communicative level. He made a very studied effort to position himself as inclusively as possible in his construct of the school set-up. His anxiety may have emanated to some extent from an awareness of being age-anomalous.

The achievers identified themselves as learners and ascribed this explicitly to belief in themselves encouraged by their teachers' constructions of them as gifted people.

#### 4.3.2.2 Agency

The policy at the trust school was to place all new learners, regardless of age, into grade R before slotting into other grades, so in effect uncoupling age norms and grades in the

perceptions of first-time learners at the outset of formal schooling. These perceptions may have been strengthened by the presence in the school of all age levels of learners who made use of the school's adult literacy (ABET) and skills training programmes. After a year in grade R, learners were placed wherever the staff deemed appropriate for a particular learner. Andrew's experience of inclusion in the school community was the least threatened and he had progressed faster academically than the others. This may mean that a perception of the education system as free of arbitrary gatekeeping is a fundamental element of healthy learning conditions.

In the construction of their own identities Margaret and Richard attached the most importance to their ability to act as voluntary agents. Both these learners had overcome formidable obstacles to progress in acquiring a new language of instruction. Their teachers' constructions of their identities as capable learners emerged in their accounts as important to their belief in the possibility of success.

However, Margaret's responses to questions in the interview revealed that for her the experience of agency was not divorced from the way the education bureaucracy, or system, set up the learning environment. She felt that systemic arrangements had an impact on her learning conditions: although she was fairly competent in Afrikaans and in any case was allowed to fulfil most of the requirements of the curriculum in English, she identified the official medium of instruction of the school as a problem for her. It was the only thing she would change if she were given the opportunity to change anything. Her account of how the language issue was handled at her school made it clear that with only one exception, her teachers were sympathetic and facilitative in making arrangements to enable her to learn in her chosen medium. One may conclude therefore that in spite of her expressed claim to depend only on herself to make progress, for her, effective learning conditions also depended subliminally on a sense of unconditional inclusion in the school community as defined by 'the system'.

#### 4.3.2.3 Inclusion

Durkin (1995: 514) makes the point that construction of the self in adolescence is not a process of 'cold cognitions' but of 'hot topics' involving

*substantial input from 'reality, in the form of school grades, peer feedback, and career prospects. In the face of these, adolescents experience emotional tasks and social negotiations, and the sense of self and self-worth can vary as a result.*

In other words, in the adolescent the construction of the self as a learner is primarily effected by affective responses to assessment events and social relations in the classroom. The adolescent's sense of security as a learner, derived from unconditional inclusion in the social relations of the classroom and authentic assessment, is an emotional issue.

In the paragraphs that follow, events and routines emerge as enhancing older learners' sense of inclusion in the school community. Although Hendrik and Sikumbuso could not hypothesise about the connection between school and post-school work, they did offer a clue to possible ways of increasing their participation and consequently their affective engagement in school routine. Enhanced inclusion seemed to be the issue they engaged with most authentically in the interview.

In response to the question about whether he would like to change anything in the school environment, Andrew, the 'trust school pupil', saw no reason to change anything. Andile, when prompted, voiced a wish to sing and play soccer more, and Sikumbuso, like Hendrik, responded by expressing a desire to be useful to the school. Andile, Sikumbuso and Hendrik's responses, though various, were motivated by a desire for enhanced inclusion in the school community. Notably, none of the activities they wanted more of were formally assessed. Whereas Sikumbuso's identity was submerged in reiterations of approved attitudes, Hendrik wanted to be asked to do things, indicating a more developed sense of autonomy and a desire to respond agentially in terms of what he imagined he could contribute: *Vullis ...iets mooi te maak*. It is noteworthy that none of the subjects could hypothesise about changing the environment or system, but the two oldest of the four could conceptualise a way to contribute to the running of the school based on an evaluation of their own experience or competences.

The inability to conceptualise alternative arrangements could indicate that none of the learners had developed strong enough personal constructs or metacognitive (formal) concepts of their learning processes to be able to achieve the critical distance necessary to evaluate their own needs and aspirations, except on the affectively experienced level of inclusion. In other words, the shift from concrete to formal operations had not yet happened cognitively, but anxiety over 'belonging' was exerting pressure affectively, and this was precipitating a slight cognitive shift from concrete to formal, represented most clearly by Sikumbuso's 'meta-school' and Hendrik's implied self-evaluation.

All the subjects valued playing ball games with their peers highly, and none of them ever voluntarily played with the younger children in their classes. Soccer was the focus of membership of informal cliques in school and friendship groups out of school. Older learners

also supported each other academically, by informally discussing aspects of tasks set in class. They noted ruefully that they were inclined to talk to each other in class, and hence had been separated by the teacher, but believed that they would work well together if permitted to. Durkin (1995: 521-530) cites studies that show that adolescents, particularly those who lack emotional support from parents, identify strongly with peer groups, and that conformity within adolescent peer groups 'signifies a desire to be accepted by some social group' (Durkin 1995: 529). Interaction in peer groups is seen as an important element of the development of prosocial behaviour and transition to adult autonomy.

Adult autonomy implies that the subject has developed an interpretive construct of the social world, in which s/he positions the self and in terms of which s/he decides between alternative courses of action. It is reasonable to argue that autonomy, or agency, is a phenomenon that depends on the existence of a formal self-concept that helps the individual to evaluate choices and make decisions. In Piagetian terms, the development of a formal self-concept requires a cognitive shift from concrete operational, or sensory response to the environment, to formal operational competence, or ability to objectify metacognitively. If the negotiation of this shift towards forming a self-concept is facilitated in peer group interaction, then recognition of peer group membership should be treated as an important aspect of the adolescent learner's pedagogic identity. If adolescents were enabled to exert political power to effect inclusion in the relations of a class by collectively negotiating positions that reflect a common interest in a prosocial way, instead of through dominating younger learners, which would be experienced by teachers and younger learners as antisocial, a momentum conducive to cognitive development might be generated by the synergy in the group.

The conclusion to be drawn then, is that affectively satisfying social relations that build a sense of self-worth are the necessary pre-conditions for effective epistemic engagement. This conclusion supports the conclusion drawn from the interviews in the pilot study, namely, that the construction of identities of older learners in the pedagogic process is fundamental to their success and should be examined as a first step in curriculum development. While older learners' identities must be unconditionally acceptable by teachers and management in the primary school setting, their need to operate in peer groups must also be accommodated in appropriate ways.

For Margaret, constraints set up by the education bureaucracy, for example the language medium, were different in their effects from those emanating from school-based regulations. She saw the bureaucratic regulations as marginalising, but approved of school rules. Although she said that the sanctions school rules imposed were not necessary to her performing well,

they did not threaten her engagement at school. In fact she said that they motivated her to work.

The only threat to her ability to engage with the system epistemically that Margaret articulated came from institutional policy that she felt threatened to marginalise her, not situational classroom based pressure. Margaret was competent to learn through Afrikaans and was allowed in any case to learn in English but wanted to continue her learning in an environment in which the language medium through which she had constructed an epistemically effective and fulfilling identity was 'official'. At age 12 she could have been expected to accomplish this epistemic engagement through Xhosa or Afrikaans, not through the language she had yet to learn. However, the identity constructed for her through the discourse of her new environment at the trust school was powerful enough to overcome the language barriers often associated with older learners' apparent lack of progress.

Sikumbuso's responses to question about his aspirations [to reach Grade 12 and be a teacher] seemed to be reinforcements of actions and attitudes that he interpreted as pleasing to the school authorities, although they seemed inappropriate because of the four interviewees, he had made the least progress through school grade levels. His effort to use a mental construct of the school environment to present a version of himself was evidence of a degree of cognitive competence, so one is led to consider the nature and effect of the construct he was probably using. His remarks about the way his parents had advised him to behave in school revealed that he assumed that there was a veiled threat lurking in the system, although corporal punishment was never used at the trust school. His response to the 'threat' was to assure the interviewer that he subscribed to the attitudes and subject positions that would ensure his inclusion in the school community:

*I like to clean the school... And I like to come in the school... and I like to play with the other children.*

His desire for inclusion, or fear of exclusion, extended from defining his status as being among *the children* to expressing an intention to complete his schooling and become a teacher - the full gamut. Sikumbuso's insecurity about the acceptability of his identity may have derived from two sources: an ideal, standard version of 'School' passed to him mainly by his parents and reinforced by teachers who did not see learners' agency as an important aspect of their pedagogic identities, and his obvious difference in age from the normal range in the class. To achieve a sense of security about inclusion he gave the interviewer to understand that he was willing to qualify in terms of any possible obscure rubric the school might be using to judge and exclude him.

Sikumbuso's meta-version of school could have exacerbated an identity status for him identified by Marcia (1966 in Durkin 1995: 516) as *foreclosure*. This identity status could have obstructed the kind of engagement with the school system that would have facilitated the development of a personal construct that could enable him to conceptualise his own agency in and beyond the parameters of the school.

#### *4.4 Interviews with principals in greater Cape Town*

The final set of interviews that I undertook comprised four principals of primary schools in the Cape Town metropolitan area. They worked in schools to which I had access in the course of teaching practice supervision and all of them dealt with the phenomenon of older learners in their classrooms, although the scale of the problem was not as great as in the Karoo schools. Bernstein's taxonomy of rights and conditions (chapter 3) helps to illuminate issues militating for or against the efficacy of learning conditions described in these interviews.

A striking feature of these interviews was the reporting of manifestations of prejudice against older learners similar to that carried in the common sense of popular discourse in the press discussed in chapter 2.

##### *4.4.1 Identity and inclusion*

The principal of a school in Brown's Farm, a mainly Xhosa speaking community living in informal housing, noted that he had observed that Euro-centric schools in Cape Town and abroad defined their identity in terms of learners' ages:

*.... when they identify school they identify school according to ages - unlike here - the only way that we can identify kids in our school is by grades.*

This meant that older learners had to be excluded from visits to a school with which his school had a 'twinning' relationship because only children of the same age as those in the English-medium host school were acceptable. The host's reasons for their exclusion were tactfully mediated to the disqualified visitors who, according to the principal, accepted the situation gracefully.

*For instance when our kids are going to visit their kids then they will restrict their age. From 6 up to 12. And then you'll find that we have got kids who are far above aged 12. Then we cannot allow those kids to go there*

*Now how do the older children react when they can't go on the visit because they're too old?*

*No - they do understand. One explains to them what the situation is.*

*But you do have to mediate - if you didn't explain, do you think they'd react differently?*

*Then they would really question why they should not be allowed to go there.*

The principal went on to explain that 'it has been part of our culture to have older children in classes'.

Age-norm referenced admission policy generated a number of dilemmas for the principal. He applied the age norms strictly in Grade 1 because he felt that the older children - 'who are supposed to be at the school' - should not be deprived by spending scarce resources on under-aged learners. He did have severe reservations however, about the recent raising of the age of admission to seven. He felt that children who had not been to pre-school would be greatly disadvantaged, and suggested that schools in areas where pre-school education was non-existent should be allowed to admit children at six years old. This would pre-empt the problem of creating a class of 'deficient' learners by arbitrarily combining those who had pre-school experience with those encountering a structured learning environment for the first time.

He also expressed grave doubts about the wisdom of combining adolescents and newly-literate adults in ABET classes. In his experience, this combination was inimical to learning conditions for both categories of learners:

*I remember I once taught in a night school - what these young people would do, they would laugh at the elderly people.....these elderly people get embarrassed you know, then they end up dropping. So unless the government can do something for the over-aged -*

*So you think it's better to keep over-aged learners, adolescents, in the school system with other children rather than in ABET with adults?*

*Better in the schools than ABET, ja.*

*What do you think the advantage is in being in school?*

*There's competition. There's no competition in ABET....Those kids have potential in music, they've potential in sport, for instance here we have gardening, we have needlework, we are busy trying to get instrumental music, right, and we have technology as well, computers -*



*So you feel there should be choices for these children?*

*Ja. If they say they cannot be in the mainstream of the public schools, let them create some other type of place for them....not straight to ABET. It doesn't work that way.*

The emphasis in this principal's discourse was on the developmental needs of learners - a therapeutic orientation echoed in the discourse of all the Xhosa speaking educators in the set of interviews conducted in greater Cape Town. Even when principals and teachers serving the Xhosa-speaking community supported age norms in theory, their belief that school was the most effective learning environment available to late starters, and the wider community's need for them to maintain the inclusive ethos of schools in order to protect adolescents from anti-social influences, took precedence over theory<sup>8</sup>. The norm operating in this principal's explanation rests on the assumption that every level of the child's development is the business of a school offering a certain range of grades. I understood from him that inclusivity (*communitas*) has a positive social value that must be respected in the absence of appropriate targeted provision.

The observation by the Brown's farm principal that ABET classes were unsuitable for adolescent older learners because they tended to become anti-social in the presence of adult learners may indicate a relationship between learners' perceptions of their status in the group and adaptation to the learning environment. The principal of the Karoo secondary school remarked that discipline problems among older learners increased in the higher grades, that is, after grade 8. In the interviews, discipline issues emerged more strongly in the discourse of secondary (grade 8) teachers than primary teachers. This may indicate that the primary sector is a more suitable environment for emergent literacy among adolescents than the secondary or adult sector.

The bi-lingual English/Afrikaans principal of a multi-lingual, multi-cultural school that drew learners from low-cost housing schemes and informal settlements also referred to the phenomenon of older learners in terms of culture, but constructed it as exotic to mainstream education, a situation caused by African parents having lately come to a realisation of the value of education:

*I think it is a cultural problem because with all due respect to all the other cultural groups, I have always come across it in African children....I think*

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<sup>8</sup> Osin and Lesgold (1996) propose overlapping grades between school phases i.e. a primary school might offer grades one to six, and a senior school might start at grade four, up to grade nine. The school could then decide to keep an at risk adolescent in a safe environment if necessary.

*it is a problem but because of the fact that the Africans now know what education can mean to the child it's not a problem with parents.*

The cultural norm implied in the latter principal's construction of the phenomenon generates an assumption that African parents' tendency to disregard the urgency of respecting age levels is due to their naïve ignorance about how the system works.

At a societal level a possible consequence of the construction of 'over-age' learners as victims of social disease or subjects produced by an exotic culture is that they would be treated as patients needing remedial or palliative treatment within the constraints of the current system. This construction would render these learners passive and their voices incapable of wielding the political influence needed to transform the system and fully legitimate their presence in the primary school. Their right to participate as agents in civic discourse would be constrained by their status as subjects of remediation until they had 'come right', that is, conformed to the logistical demands of the system. In the mind of the literate class that enjoys hegemony in the Western Cape, conformity with age norms in the education system is the measure of cognitive and social development.

#### 4.4.2 Agency

Fundamental to the learning subject's ability to realise rights of inclusion in a learning community - *communitas* (Bernstein 1996) – would be a sense of self as being equally agentic as everyone else. This means that for learning conditions to be effective, the learner must understand and assent to the grammar (contractual terms and processes) of the pedagogic relationship (Bernstein UCT seminar 1997) being constructed. Labelling represents the *naturalisation of subject positions* (Fairclough 1989: 73) into stereotypes that are assigned certain social identities and positions in the discourse of the institution. It is a one-sided process of construction that can rob one party of authentic voice because the assigned identity constrains what the subject can legitimately say and do. A voiceless party cannot voluntarily assent to the terms of the pedagogic relationship. In an age-norm referenced system labelling is particularly arbitrary and constraining.

Although the following statements from a study of early indicators of high school dropout do not critique the mono-age system, they do contain a warning about the effects of labelling on learners:

*We are not saying that what happens in first grade necessarily seals children's fates, but prospects for "re-engagement" later are not good when children are plagued early in their school careers with self-doubt, are*

*alienated from things academic, are over-age for their grades, are relegated to remedial courses, are prone to "problem" behaviors, are labelled trouble-makers, and have academic skills that are far lower than the standard at which the curriculum is keyed. (Alexander, Entwisle and Horsey 1997: 98)*

The Grade 8 interviews revealed that teachers believed that being 'over-age' actually generated 'problem behaviours'. A logical inference to be drawn therefore is that age norms are counter-productive and discriminatory in that they alienate learners and dispose them to behave anti-socially.

Unless appropriate organisational change happens, labelling of older learners as anomalous is likely to persist, interfering with their experience of *communitas*. In the interviews it became clear that sport was an important element in providing opportunities for older learners to experience *communitas* in the school, but even this is being eroded by the commonsense of sporting organisations that expect schools to comprise particular age cohorts and therefore specify which learners they will select for development according to age criteria:

*...you know what now there's this restriction of age even in sport now ... it is a shame, ja, it is worrying us ....because we used to allow the seventeen, eighteen year olds when we had our sports in the township. But now according to USASA regulations they suffer because there are no sport for them...It is a big problem, inasmuch we are even thinking of having our own sport. Because of that - for the sake of the kids. We can't wish them away - they are here at the schools, the fifteen year olds, the sixteen year olds. We even have eighteen year olds, you see. [Principal of a Site C school, Khayelitsha].*

*...this [age restriction in sport] is a problem because one sport organiser came to our school some time last week and he wanted the ten-year olds so as to register in one of the local teams ... but now they don't want the elderly (sic) ones....because it is where they select the players from the respective schools, at the same time there are local teams outside which are managed by some other people where they [can play]. [Principal of a Nyanga school].*

The initial Grade 8 teacher interviews had revealed that an experience of *communitas* (Bernstein 1996) - or inclusion in the spirit of community - is indispensable for confidence, a condition that should be experienced at the situational level of pedagogic relations. These remarks by principals corroborated their observation in the context of the extra-mural curriculum. Confidence is necessary for the development of a voluntaristic disposition in the learner, fundamental to the notion of *life-long learning*, a core principle of Curriculum 2005.

#### *4.5 Summary of findings and interpretations*

The following propositions derive from analysis of the interviews with teachers:

- The education system's construction of their discursive identities is likely to be fundamentally responsible for the exclusionary pressure experienced by older learners. This construction of the learner as aberrant militates against the existence of conditions necessary for realisation of learners' rights to effective access to education. Status is an important aspect of identity and their status in the system does not match the status they accord themselves with reference to age or rites of passage, a situation likely to produce alienation. Agency is denied because they are 'deficient': what they can do voluntarily is not in sync with standardised norms of performance. When they make an effort to exert power in the system to effect inclusion (bullying to enable token handing in of homework) authority figures construe and younger learners experience their behaviour as anti-social. This line of argument suggests that the construction of older learners' identities, or their positioning in school discourse, needs to be reviewed in order to improve their behaviour. Their problematic behaviour may be explained as a response to learning conditions in an alienating environment.
- The selection of information that the teachers judged relevant to my inquiry showed that social relations in the learning environment were seen to be of more concern to them than measurement of cognitive ability. Lack of confidence experienced by learners about the inclusion of their identities in the classroom could have led to lack of belief in their ability to exercise agency in the system.

The following propositions derive from analysis of the interviews with the trust school learners:

- Learners' anxiety about their security as members of the learning environment can interfere with their ability to experience epistemic engagement with learning programmes. If they feel insecure they are likely to spend a disproportionate amount of time and energy on interpreting and negotiating their social positioning rather than on focussing cognitively on curriculum-based tasks. This could dissipate their focus and concentration.

- Conversely, where learners' identities are unconditionally affirmed as fully legitimate and competent in the environment they can overcome apparently insurmountable cognitive barriers to learning (for example having to learn a completely new language).
- Arbitrary (in the sense of despotic) exclusion, produced by standardising policies of education departments, could pose a serious threat to learning conditions for large numbers of older learners because they can sense the illegitimacy of their presence implied in the policy when it is played out at classroom level. Their sensitivity to this implied illegitimacy may account for their perceived apathy in school.
- Primary classroom environments need to ensure the unconditional inclusion of older learners and also to accommodate their need to interact in peer groups. This implies that classroom activity will be organised according to assessment of learning outcomes, not teachers' age-referenced expectations of learners' competence. While teaching strategies and classroom management should mobilise the potential of co-operation between peers to effect prosocial attitudes and metacognitive competence, classes do not have to be completely homogeneous in terms of age to effect peer cooperation.

The following propositions derive from analysis of the interviews with principals in greater Cape Town:

- Conditions favourable to the possibility of new, transformative constructions of learner-identities were more prevalent in ex-DET schools than in ex- Model C, private or ex-House of Representatives schools. The ad-hoc practices of teachers and principals in township schools predisposed them towards a construction of learners not tied to age-referenced performance. Therefore, mutations of policy caused by ad hoc practices at grassroots level that happen in the course of its implementation can work to the older learners' advantage if the common sense of the community and school personnel militates against the rigid demands of standardising policies.
- Common sense of off-campus agencies that are not part of previously disadvantaged communities interacting with schools (for example, sport organisations) poses a threat to the conditions necessary for realisation of rights of older learners to *communitas*, an essential element of confidence-building. This form of common sense tends to

prioritise systemic efficiency over subjects' rights of access to effective education, consigning older learners to 'wastage' categories.

- Because there is flexibility in attitudes towards age norms in previously disadvantaged primary schools, conditions exist for innovative, emancipatory reconceptualising of school management to eliminate the disadvantage produced by the notion of 'over-age'. A window of opportunity exists for uncoupling grade and age synchronicity in favour of authentic criterion referenced assessment. This possibility however, is threatened by increasing pressure to standardise in the interests of 'efficiency'.
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## 5. CONCLUSIONS AND IMPLICATIONS FOR RESEARCH

### 5.1 Introduction

In this chapter I discuss the conclusions of the study with reference to its limitations and propose tentative suggestions for a research agenda that could reorientate assessment and teaching practices to enhance the positioning of older learners.

This study has been limited by the fact that the field into which this project led me was new to me and that I have conducted the research in isolation. The research has been subject to constraints of time and access. A further limitation may be that my background has been in literary discourse rather than empirical educational research and this has influenced the paradigm of the research in a non-positivist direction. Therefore the results are not generalisable but I hope reveal tensions in policy that result in disadvantaging pressures on conditions of learning for older learners. They may suggest that further research into the implications of criterion-referenced assessment for practical school reorganisation to facilitate authentic progression for older learners needs to be undertaken.

Given the above limitations, the study has revealed that at present, it appears that planners sharing the assumptions of past practice based on a lockstep notion of age-grade progression dominate policy with regard to deployment of resources. The main assumption affecting older learners is that learners should move through the primary grades in age cohorts and that the age of the learners determines the grade level they can be expected to be engaged with. This assumption has been challenged by research into situated learning, constructivism and cognitive apprenticeship (Osin and Lesgold 1996: 624-625) that has found that children develop cognitively at highly variable rates. These findings imply that every child should be subjected to criterion, not norm, referenced assessment if proper account is to be taken of their development and their individual potential realised. This change in practice might result in different age cohorts moving through the same grades together, which would have implications for time and space management in implementing the curriculum, as well as for the management of learners' psycho-social relations with their peers in school.

Three questions were posed at the outset of this dissertation. My conclusions are grouped under the rubrics implied by the questions.

## 5.2 How does South African education policy frame and influence older learners' learning conditions?

During the course of this investigation I have found that there is a crisis of coherence in the framing and implementation of education policy in South Africa. Although a rights-based, and by implication learner-centred, dispensation is in the process of being instantiated, systemic efficiency over subjects' rights of access to effective education appears to be the departure point for practical policy implementation. Assumptions favouring the primacy of systemic efficiency before learning outcomes run through all orders of education discourse - societal, institutional and situational - that impact on policy formulation and implementation.

Learning conditions are essentially framed by the standardising policies of education departments. As a result of this situation, learners are constructed as 'deficient' if they do not measure up to norms standardised in terms of age. An effect of this is that agency is denied because what learners can do voluntarily is not in sync with standardised norms of performance. The environment is then likely to be experienced by learners as dominated by arbitrary power.

However, because there is flexibility in attitudes towards age norms among principals and teachers in previously disadvantaged schools, conditions exist for innovative, emancipatory reconceptualising of school management.

These issues are elaborated below.

### 5.2.1 Common sense, metaphors of industry and policy

The above findings are supported by a careful look at the terminology used in some global funding agencies' documents to describe schools **efficiency**. Scrutiny of language used in official discourse reveals that norms based on notions of Education as a phenomenon separate from the subjects involved in it, and having a kind of autonomous existence, are still taken for granted by those who control resources:

*the main ways in which governments can help improve the quality of education are setting standards, supporting inputs known to improve achievement, adopting flexible strategies for the acquisition and use of inputs, and monitoring performance. (World Bank 1995 in Jones 1997: 127)*



Discursive events are seen as having a material base independent of the subjects in the discourse. The phrase *acquisition and use of inputs* suggest that educators can expect success if they pick up prepackaged discursive techniques and deploy them in the classroom. Criteria implied in the above quotation are exterior to the subjects, suppressing the question of seeing mobilising the agency of learners as a measure of success. Terms such as 'unit costs' and 'drop-out rate' are used to measure the efficiency of systems in developing countries. This measuring process generates further terms such as 'through-put' and 'wastage'. Metaphors of industry and the market objectify the learner, a 'product' of the education factory. The adolescent in primary school becomes an element of 'wastage'. These conceptualisations are not helpful to learners who move into and out of the education system because of poverty, the reason cited by the majority of primary school 'drop-outs' in the CASE study (Bendit and Gaiser 1995).

Findings derived from interviews with achievers at the trust school indicate that when learners' specific needs are addressed before the need to conform to rigidly applied norms, barriers to learning and agency may be overcome. School **effectiveness** (as opposed to efficiency) therefore is a localised concept, and usually refers to success in empowering students to become economically active and socio-politically agentic. To achieve this, learning programmes have to be modified to suit diverse learning conditions. Unfortunately, attention to school effectiveness, which implies a primary interest in context-specificity, is often overwhelmed by concerns related to **cost effectiveness** '*expressed in terms of a cost-benefit analysis*' (Jones 1997). Cost effectiveness is often used in the context of funding by government and global agencies and should not be confused with epistemic effectiveness, an issue that tends to become the preserve of non-governmental organisations that lead the way in innovation and experimentation (Chisholm, Harrison and Motala 1997:234).

### 5.2.2 Diversity at local level

The recurrence of attempts by some teachers and principals to find explanations for problems experienced by older learners in local cultural practices seems to confirm Potter's (1995) view that conditions should be constructed in a way that takes account of localised cultural contexts. Potter confines his observation to commonly understood cultural issues and does not mention groupings marginalised by the imposition of other kinds of norms, for example, age. But the principle of accommodating diversity would be an important lever to insist on restructuring the system to suit older learners, rather than forcing learners to conform to unrealistic norms of the system.

### 5.2.3 Development and reconceptualising resource deployment

The construction of older learners' identities based on their developmental needs, alluded to by the Brown's Farm principal, in other words a therapeutic orientation in Bernstein's terms (learner-centeredness), would require radical organisational and curricular transformation. While Curriculum 2005 offers an opportunity to effect the necessary changes, in its current reorganisation of resources and logistics the education bureaucracy has not fully taken account of the need to uncouple age-norms from assessment of grade-related outcomes. The logic of Curriculum 2005 offers learners certain graded levels of education regardless of age at commencement of the programme but the policy of resource providers is locked into time frames that are inadequate for local conditions. It stipulates that the learner is either a child or an adult; no cognisance is taken of the particular psychosocial developmental needs of adolescents at their most unstable and vulnerable stage of life, and just emerging into literacy.

### 5.2.4 Power and change implementation

The school environment would become unrecognisable to observers who had been schooled in a system standardised in terms of age. It might prove difficult for departmental bureaucrats to survive the political pressure likely to be brought to bear against radical changes in assessment practices, and therefore school organisation, from a hegemonic political constituency schooled in what was for them a fairly successful implementation of factory-model management that construes 'lateness' as dangerous aberrance in its commonsense about education.

In the Western Cape transformation of education management has a social dimension rooted in political contests between constituencies that do not share common sense with regard to assessment of progress through school. Basically, the arena of contestation is defined by concepts of the relationship between time governing the pacing of the curriculum and time governing human psycho-social development. Time is the most problematic concept to negotiate because its inherent dynamism demands uninterrupted management. Versions of time cannot be captured, contemplated, experimented with and rejected or repeated for a learner. Material and spatial arrangements can be tested, changed and reversed, but time is a non-modifiable, non-renewable resource.

Time however, is the nettle that has to be grasped first to effect radical change, because decisions about pacing and sequencing of the curriculum to gear it to cope with early or late, fast or slow learners would govern decisions about material and spatial arrangements. In a

rights-based dispensation epistemic conditions cannot be considered effective in ensuring adequate access to education if learners are disbarred from participation by gatekeeping that applies arbitrary time-referenced norms for admission to cognitive-developmentally appropriate learning sites.

### *5.3 How do older learners respond to the construction of their identities in the learning environment?*

Teachers in geographically widely separated contexts reported that older learners tended to be apathetic in the classroom. The anecdotes chosen by teachers to describe older learners' responses in the classroom and my observations drawn from learner interviews suggest that lack of confidence experienced by learners about the inclusion of their identities in the classroom could have led to lack of belief in their ability to exercise agency in the system. Their sensitivity to the implied illegitimacy of their presence in particular age-defined classes may account for their perceived apathy in school.

Where older learners had participated in classes in the trust school with younger learners and had been able to move on they seemed to accept the situation and define themselves as 'children' if their presence in such classes had been related to their level of competence<sup>9</sup>.

However, learners at the trust school expressed a need to interact in peer groups by indicating that they would like to be allowed to help each other in class. This desire by learners was corroborated by a Cape Town teacher who reported the effectiveness of a study team formed by older learners in his class. Older learners' identification with younger learners in the trust school in a learning context did not appear to affect their out-of-class socialising activities with age-peers negatively. This may indicate that where a pragmatic attitude to class membership prevails, being 'older learners' in the class does not have a significantly damaging effect on their perceptions of their identities and the need to interact in peer groups can be flexibly accommodated.

These issues are elaborated below.

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<sup>9</sup> In the conference referred to on page 39 the director of the Salesian project for street children in Cape Town reported that street children frequently faked their ages to gain access to appropriate educational opportunities. This suggests to me that being with their age peers is not as important to these children as being able to cope with the cognitive level of the school work.

### 5.3.1 Older learners, teachers' constructions and confidence

My perception that it would be relevant to examine the subjective responses of learners to their learning conditions concurs with Everatt's (1995: 461) conclusion:

*The... challenge for researchers and the government lies in understanding why almost half (46%) of those with primary level education do not desire to study further.*

Older learners from other schools who were aware that they had entered the trust school environment 'late' showed considerable anxiety about their acceptability in the classroom. The achievers, however, who ascribed their belief in their own abilities to their teachers' affirmation of their identities as competent individuals during the primary years, were notably confident and self-directed. This indicates that teachers' constructions of their learners are an essential element in effective learning conditions.

Interrogating teachers' current constructions of the adolescent ('over-age') learner in primary school is therefore an important step towards reconciling the curriculum goals of 2005, classroom practice and successful achievement trajectories for learners.

### 5.3.2 Synergy versus social promotion

The preference among older learners for interacting with peers to accomplish tasks or engage in recreational activities was strongly evident in the data from teachers and learners. However, this interaction could become either anti- or pro-social in the classroom, depending on how it was managed and where it took place. It appears that when the assessment of the group was not subjected to negative comparison with younger learners but its synergy was directed to participation in ways that were designed to enhance the esteem of the older learners in the estimation of the teacher and themselves, group activity tended to be pro-social. This suggests that grouping in age-cohorts should be determined by the likely potential of social relations to facilitate particular outcomes rather than grade-level curricular assessment. Grade assessment should be separated from the learner's biologically determined identity. Social promotion should be task and outcome-related, not arbitrarily imposed in terms of age norms, a practice that could contribute to accumulation of learning deficits.

The following question flowing from the tentative answers to the above research questions raises issues pertinent to formulating an agenda to explore some implications for future policy.

#### 5.4 Can deployment of resources be adjusted in school management to provide older learners with optimum access to state education?

##### 5.4.1 Research, policy contradictions and the budget

The will to address the epistemological crisis in South African schooling and the lack of locally viable pedagogy is implicitly recognised in the proposed implementation of Curriculum 2005 and in prioritising the upgrading of in-service teachers' skills (Motala 1995; Johnson 1995). The new curriculum represents a major shift for the state education system, with the potential to impact fundamentally on the redefinition of 'overage' learners through the concept of life-long learning, but this potential is severely constrained by the standardising imperatives of achieving equity as fast as possible, conceptualised in terms of the factory model.

Current efforts to achieve equity and redress in education are severely limited by the national budget (Cape Times 25 June 1998) but are politically top priorities for the government. Policy-makers in the field of administration are therefore likely to be influenced by research supporting cost-effectiveness and speed of implementation, which are criteria derived from industrialism.

Fuller and Clarke (1994:120) suggest that there are two camps of researchers: *classroom culturalists* and *policy mechanics*. Policy mechanics favour a production-function conception of school effectiveness that looks for universally effective practices and inputs. *Production-function* is a metaphor derived from manufacturing to describe the relationship between discrete pedagogical and material inputs, and measurable cognitive achievements. Classroom culturalists examine why similar inputs yield variable benefits in different cultural settings. Because research into culturally modulated use of educational tools is not easily generalisable the culturalists' notions would complicate and so slow down decision-making. Fuller and Clarke (1994: 123) make the point that governments aim to reduce inequality in pupil performance according to universalised criteria, and so they tend to see the research of the mechanics as more useful than that of the culturalists, because the inference that can be drawn from the mechanics' research is that uniform input will produce uniform performance. This simplifies decisions about budget allocations:

*The hunger for universal remedies also stems from the desire of benefactors, such as the World Bank and central governments, to find*

*simple investments (like textbooks) that raise classroom quality and achievement, independent of local conditions.*

In fairness to the World Bank however, their support of the Compensatory Program to Address Educational Lag (Tatto 1997: 411), a constructivist, context-specific project to improve the quality of education in Mexico, should be noted.

Norms based on notions of standard unit cost-effectiveness will militate against provision of programmes based on the need to create effective epistemic conditions for what is judged pragmatically to be a minority of learners who will probably become less of a problem if age-norms were more strictly adhered to. These learners come to be seen as dispensable.

Probably, resources will not be deployed to target the needs of anomalous groups unless 'classroom culturalists' can prevail over adherents to the production-function paradigm.

#### 5.4.2 'Over-age', access and transformation

The 'over-age' child is a construction caused by a system that is dysfunctional for the learners in question because it creates the possibility for their expulsion from the system at a developmentally sensitive stage. The logic of Curriculum 2005, according to which the dysfunction caused by age referencing has officially become a deficit in the system and not in the learner, supports major change in curriculum management.

Under a rights-based dispensation individual claims take precedence over the logistical efficiency of the system. However, the claims of redress and equity compete for scarce resources. Deployment of resources in a way that would provide optimum access to effective education for older learners can happen if a conscious choice is made by management between redress, which would require major reorganisation of schooling to enable older learners to learn effectively, and equity, which could be achieved relatively easily if interpreted narrowly as equal distribution of resources among schools.

Transformation in the episteme typified in the principles underpinning Curriculum 2005 and the National Qualifications Framework favour deployment of resources in a way that would cease to be dependent on age-grade correspondence.

### 5.5 Implications for further research

To effect significant change for older learners, research and comprehensive practical measures to alleviate their alienation in the educational system might be undertaken at levels mentioned earlier in this report:

- societal
- institutional
- situational.

#### 5.5.1 Societal - costs of wastage

Research into the socio-economic costs of trajectories of older learners who drop out of schooling, are at risk or do not achieve sustainable levels of literacy could be undertaken to negotiate coordinated national budgetary priorities among departments dealing with youth, labour and welfare.

Research could include:

- quantitative measurements of the costs of welfare and other interventions undertaken by the state to deal with the consequences of illiteracy,
- qualitative studies of large samples of life histories of learners who had left the school system without being functionally literate due to age-norm problems.

Results of this research could be used to hypothesise possible trajectories for learners and plan effective interventions.

- Learning deficits possibly related to the practice of age-norm based social promotion not linked to outcome-achievement could be investigated in relation to wastage of resources.
- Cost-effectiveness, often an argument advanced in favour of age-norm organisation, motivates the argument generating a comprehensive proposal by Osin and Lesgold (1996)<sup>10</sup> to uncouple grades from age-norms (6.2 below). The feasibility and cost of implementing such a programme could be investigated in relation to estimated costs to the economy of school dropout rates.

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<sup>10</sup> See chapter 2

### 5.5.2 Institutional - reengineering the system

Although Osin and Lesgold's (1996) proposal assumes a level of technical resourcing out of reach of disadvantaged schools at present, the project-based approach could be useful with modifications for older learners for reasons cited by the authors (1996: 640-641) but also brought to light in the course of the interviews:

- a team approach to learning would allow learners to communicate and confer with peers,
- project-simulations would provide learners with realistic models of post-school work not experienced by them because of the limitations of their own environments,
- learners would better understand the applicability of school knowledge to other contexts, *thus overcoming the old problem of "inert knowledge"* (Osin and Lesgold 1996: 641).
- By following a task through from conception to presentation learners engage in learning phases comprehensively. The likelihood of incomplete learning is reduced.

Restructuring education environments to uncouple grades from age-norms by using a project-based approach would necessitate considerable research, including the following areas:

- Mapping the curriculum onto projects would be a major undertaking in curriculum development. Graded projects would provide opportunities for structured assessment criteria that focus attention on outcomes rather than on personal development. Uncoupling grades from age norms implies that learning outcomes would have to be closely defined and assessed in order to be applicable to a class of learners at diverse stages of development. Research that would inform the development of appropriate series of projects to mediate skills acquisition and cognitive development would be necessary.



- Computer software provides individual learners with opportunities for completing pre-designed programmes that do not rely wholly on teacher-mediation, an advantage where teachers lack an adequate knowledge base in a particular discipline. To assist under-resourced teachers, lists of material resources, including software, and their probable sources of availability in the region would have to be supplied with project designs.<sup>11</sup>

However, project-based learning need not be precluded from the older learners' programmes in the absence of computers. Collaboration between clusters of educators from schools in a designated area in the design and management of projects for older learners could be considered on a trial basis. Collaborative professional development of teachers and reorientation of whole schools away from lockstep age referencing towards assessment of meaning-making would be crucial to the success of the kind of restructuring proposed by Osin and Lesgold.

- Training of educators to familiarise educators with projects would have to be undertaken. Project designs would have to include assessment and record-keeping techniques to enable teachers to keep track of individual progress. A close relationship between research, development and teacher-support services centres would have to be initiated.

The use of time and space in the learning environment would have to be reconceptualised to enable project-based learning.

- Learning spaces would be structured according to knowledge and process requirements and the same space would be usable by learners completing projects of different complexity simultaneously. Shared space would enable less competent learners to benefit from modelling by more competent learners. Furthermore, any space in which a project may take place, whether indoors or even off campus, would be a learning space, occupied by a variety of role players and participants. Re-orientations of space would necessitate innovation in school design.

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<sup>11</sup> Since the interviews were conducted for this report in 1998 the trust school has successfully implemented a mathematics computer programme that has revealed unexpected levels of aptitude in some learners who are moving through grade levels considerably faster than before computers were available.

- Time frames would be determined by the pace, complexity and presentation goals of project processes. Open blocks of time would be available to allow sustained attention to achieving the outcomes of projects. A single cumulative assessment event could accommodate the presentation of a variety of processes at different levels of cognitive operation. One group of learners could present a highly complex result achieved over a defined period, while another group at a different level of understanding of the concept might present a series of more simple operations completed during the same period. Alternative approaches to time management in schools would have to be investigated.

### *5.5.3 Situational – supporting a learner-centered project-based system*

Specific site-based research into classroom practice could include the following:

- Mapping the curriculum onto projects would require assessment of learners' cognitive competence and its relationship to expected levels of performance specified in curriculum guidelines. These assessments would include quantitative measurement of the relationship between suggested project performance indicators and actual learner-ability.
- Subjective issues influencing learners' voluntaristic engagement in the projects could be qualitatively explored. Issues might include learners' interest, self-concepts and esteem, perceptions of relevance, linguistic confidence, and responses to different teaching styles. Research into responses to teaching styles could include comparative quantitative elements.
- Action research could be undertaken during trialing of projects to determine depth of content, effective sequencing and appropriate pacing of different versions of projects to accommodate various levels of development among older learners.
- Action research could also be used to track teacher development through building self-assessment into the appraisal and implementation cycles of the research.
- Learners' subjectivities could be investigated to discover sources of motivation that effect engagement between older learners and knowledge production in the terms of the transforming episteme in South Africa.
- Research could identify and describe successful mediational teaching and learning environments in South African contexts and present practitioners with exemplary models.

The discussion of the limitations of exploratory research in chapter 3 highlights the inherently inconclusive nature of the study. However, during the course of this investigation I have

undergone a change in perspective and have become more secure in my understanding of how transformed epistemic relations are likely to play out in the construction of learning environments, should the discontinuity in the episteme be resolved in the emergence of a new rights-based epistemological tradition.

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## APPENDIX 1

*Synchronicity between NQF principles and Osin and Lesgold's rationale .*

	<b>NQF principles</b>	<b>Osin and Lesgold rationale</b>
1. Integration	establish the basis for an integrated approach to education and training as part of a human resources development policy aimed at integrating theory with practice and academic with vocational	<i>students will need to learn more and become more facile in quickly marshalling their accumulated knowledge to engage in new, complex, and probably collaborative work (p622)</i>
2. Relevance	be and remain responsive to national economic, social and political development needs	<i>the economic system will continue to reward those who can engage in economically productive enterprises (p622)</i>
3. Credibility	have national and international value and acceptance	<i>there are many jobs that can be moved anywhere in the world (p622)</i>
4. Coherence	work within a consistent framework of principles and certification which allows learners to clearly link credits into meaningful learning or career pathways	<i>the performance of a project can be recognised as the satisfaction of the requirements for certain segments in an overall set of schooling standards (p641)</i>
5. Flexibility	allow for multiple pathways leading to the same learning ends	<i>take into consideration that a student may have different aptitudes, and different learning rates, in diverse areas of knowledge (p645)</i>
6. Quality	be expressed in terms of nationally agreed outcomes and performance/assessment criteria, thus facilitating both monitoring and provisioning	Note: Osin and Lesgold warn against an inherent contradiction in outcomes being linked to expected rates of progress if monitoring implies adhering to time scales (p632)
7. Legitimacy	provide for the participation of all national stakeholders in the planning and co-ordination of standards and qualifications	<i>a broad approach, with differences in standards for different communities, is a political necessity and perhaps also adaptive to local needs (p642)</i>
8. Access	provide ease of entry to appropriate levels of education and training for all prospective learners in a manner which facilitates progression	<i>the educational system has a social obligation to provide education to everybody, without preconditions, without filters, and without rejections (p631)</i>
9. Progression	ensure that the framework of qualifications permits individuals to move through the levels by accumulating appropriate combinations of credits	<i>a school should recognise instructional credits (records of standards mastery) and register them in a personal record when the corresponding mastery is accredited by a state-recognised educational institution (p6470)</i>
10. Portability	enable learners to transfer their credits from one context to another	See 9 above.
11. Articulation	provide for learners, on completion of accredited prerequisites, to move between components of the delivery system	See 9 above.
12. Recognition of prior learning	through assessment, to give credit for learning which has already been acquired in non-formal ways, e.g. through life/work experience	<i>the recognition that students may actually come to school with knowledge of their own will significantly increase the efficiency of the educational system (p647)</i>
13. Guidance of learners	provide for the counselling of learners by specially trained individuals who meet nationally recognised standards for education, training and development practitioners	<i>a hierarchy of levels and special tasks [for teachers] will be created, as more experience is developed and a variety of requirements is discovered (p650)</i>
14. Democratic participation	provide for the active participation of practitioners in the relevant field in the writing of unit standards and in their regular revision	<i>We do not undertake to specify what students should learn. That is a major task for educational researchers, the public, and the political process. (p642)</i>
15. Equality of opportunity	at different rates by learners with specialised educational needs, by adults and by children, both inside and outside mainstream schooling	<i>learning opportunities and movement within the curriculum are individualised to correspond with individual needs, interests and abilities (p632)</i>



## APPENDIX 2

### *Interview schedules*

*The purpose of these loosely structured schedules was to provide a set of prompts to keep the interviews going and to elicit spontaneous responses and contributions. Not all the questions were used in all the interviews and the order of questions was varied according to how the interviews progressed. Questions were used to make sure that opportunities emerged for comparable data to be gathered.*

#### 1. Teachers.

1.1 Do you notice any differences of performance or behaviour between the older learners in your class and those who are the 'normal' age for the class?

1.2 Do you perceive any differences in attitudes to learning between older and age-normal learners?

1.3 Do you set homework? If so, how do learners respond?

1.4 Do older learners respond differently to certain teaching styles?

1.5 Do you make any special arrangements for older learners in your class?

1.6 How do older learners respond to the teaching materials in the classroom?

1.7 What kinds of relationships exist between older and younger learners in your class?

1.8 Are there differences in behaviour or performance between older girls and boys in your class?

1.9 Who do older learners socialise with outside the classroom?

1.10 What do older learners do out of school hours?

1.11 Is there anything you would like to tell me that we haven't mentioned?

1.12 Is there anything you would like to ask me?

## 2. Learners

*Most of the learners struggled to converse in English, their third language, and the interviewer did not speak Xhosa, their first language. Therefore most of the learner interviews were conducted in Afrikaans, the second language of both parties.*

2.1 How old are you?

2.2 Where were you born?

2.3 What grade are you in at school?

2.4 What age were you when you started school?

2.5 Did you start school here or somewhere else?

2.6 When did you come here?

2.7 Up to what grade do you want to go in school?

2.8 Who do you live with?

2.9 How many people live in your home?

2.10 Who looks after you?

2.11 How far do you have to travel to come to school?

2.12 Is there a person who encourages you to come to school?

2.13 Did the people you live with go to school?

2.14 Do the people at home understand that you have to do homework for school?

2.15 Is there someone at home who can help you with schoolwork?

2.16 Do you have duties to do at home after school? If so, how long do they take to do?

2.17 Is there a place at home where you can do schoolwork?

2.18 What do you like to do after school in the afternoons?

2.19 What do you like doing at school?

2.20 What do you find difficult and what do you find easy at school?

2.21 Are there problems at school that make it difficult to learn?

2.22 Would you like to learn in Xhosa?

2.23 Who do you spend your spare time with at school?

2.24 Do you ever spend spare time ['play'] with younger people in your class?

2.25 In class, do you sit with other older learners or with the younger ones?

2.26 Is it better to sit with the older or younger ones?

2.27 What work are you going to do when you leave school one day?

- 2.28 Is there a person you would like to be like?
- 2.29 If you could change anything at school what would you change?

### 3.Principals

- 3.1 Do you see any differences between learners who are older than three years over the norm and age-normal learners in your school?
- 3.2 Does the policy regarding admission of older learners cause problems for you?
- 3.3 Are there any other pressures that cause problems in handling older learners in your school?
- 3.4 Should older learners be accommodated in a different way?
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